

# Administration Manual

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## ABOUT THE PMAPS VIEWER

The PMAPS Viewer has two parts. The WebPro Core Components is a standard installation package (.msi) and allows the WebPro Viewer to communicate with your local Microsoft Office and the PMAPS application servers. This portion is the same for all versions of PMAPS. The second part is specific to the version of PMAPS in use. The Viewer is configured the first time a user launches it. It runs in the existing user profile and does not require administrative rights as long as the WebPro Core Components were installed.

This document contains the recommended configuration (recommended for optimal performance) as well as permitted configurations. Also included is the Viewer Configuration Form.

### Recommended Configuration

- Microsoft Windows 7
- 4 GB RAM or better
- .NET 4.0 Framework
- Internet Explorer 11
- Microsoft Office 2007, 2010, or 2013 (full installation only)
- Latest version of Adobe Reader

NOTE: Microsoft Office 365 and Click-to-Run installations are **not** compatible with PMAPS.

### Permitted Configuration

- Microsoft Windows 7, 8, or 8.1
- 4 GB RAM or better
- .NET 4.0 Framework
- Internet Explorer 9 or 10 (32-bit only) or 11
- Microsoft Office 2007, 2010, or 2013 (full installation only)
- Adobe Reader 6.0 or better

For information about installing the Core Components and Launching the Viewer for the first time, please refer to the [PMAPS WebPro Core Components Installation Guide](#) and [PMAPS WebPro Viewer Launch Instructions](#).

## LOGIN INSTRUCTIONS

1. Enter the user name and password (typically this will be sent directly to you via email).

It is recommended that you click the Remember Me button upon logging in. This will keep you logged in during the entire IE session.

The image shows the login interface for PMAPS WebPro. At the top is the logo 'pmaps WebPro' in black and blue. Below it is the text 'Please log in to begin.' in blue. There are two input fields: 'User Name' and 'Password'. To the right of the Password field is a 'Login' button. Below the Password field is a 'Remember Me' checkbox. At the bottom is a link 'Forgot your password?'.

## First Time Login Change Password

1. A new user will receive a temporary password directly from the system. As a new user you should change your password upon first login. To access the Change Password area, click on the [Administration](#) panel.
2. Enter the password provided to you in the [Current Password](#) field.
3. Enter a new password of your choice in the [New Password](#) field. Passwords must be at least 8 characters in length using any combination of letters and numbers, but must contain at least one symbol. Any of the following symbols may be used [!@#\\$\\$%^\\*\(\)](#). Do not use the [&](#) or [+](#) symbols as those are used in code and may cause the password change to not be accepted. We can change this rule on our end if you have specific requirements.
4. Enter the same password again in the [Confirm New Password](#) field.

### ✓ TIPS

- ❖ You may change your password at any time by clicking on the [Administration](#) link

5. Make a note of your password and save it in a secure place.

## OPTIONAL: Single Sign On

Single Sign On (SSO) is available for both hosted and installed customers. Please contact your Client Service representative for details on supported configurations for your installation type.

## OPTIONAL: Indexer

The PMAPS® WebPro Indexer (“Indexer”) is an optional installation that allows users to Search outside the WebPro database using Indexed Directories. The Indexer must be installed on at least one client controlled Windows server or Windows computer which meets the required specifications. Once installed, the Indexer can be run as a standard desktop application or as a Windows service

This feature is not available for Web Essentials Customers.

For more information on the PMAPS WebPro Indexer please refer to the [PMAPS WebPro Indexer Installation Guide and Comprehensive Checklist](#).

## ADMINISTRATION APPLICATION CUSTOMIZATION OPTIONS AND INSTRUCTIONS

## WebPro Modules

During the implementation process, the Client Services associate, which is assigned to your implementation, will assist you in setting up your application to align with your company's terms or nomenclature.

PMAPS WebPro is designed with an integrated modular structure. Following is a list of the current modules:



- **Navigation Central:** New in Version 8.3, Navigation Central is an interactive navigation screen accessible to users upon login. From this screen users can access training videos to learn about different functions.
- **Dashboard:** Allows all users, who have the appropriate rights, to view proposals that have been logged into the WebPro application. It also allows them to edit, delete, and add new proposals to the Tracking module.
- **Search:** Allows all users, who have the appropriate rights, to view the database records containing proposal content. It also allows them to edit, delete, and add new records to the database.
- **Pitch Book:** Allows all users, who have the appropriate rights, to assemble Pitch Books or presentations using three types of documents: Microsoft PowerPoint, Microsoft Word, and Portable Document Format (PDF). Please refer to the detailed [Pitch Book module](#) instructions provided in the User Manual for more information on using this tool.

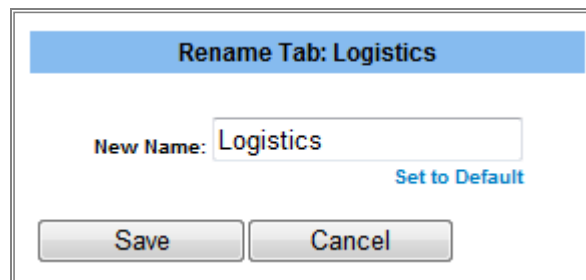


- **SmartCart:** Allows all users, who have the appropriate rights, to send database records in the form of Word attachments to Subject Matter Experts (SMEs), received records back from SMEs, review the records, and upload the content changes back into PMAPS.
- **Calendar:** Allows all users, who have the appropriate rights, to review the calendar, add items to the calendar, and edit items on the calendar.
- **Reports:** Allows all users to run built-in reports or create and run custom reports based on the tracking fields and search attributes.
- **SalesDocBuilder:** Allows all administrators to build SalesDocs.
- **Assembly and Project Management Center:** Allows all administrators to create and maintain templates to automate proposal production.
- **RFP Assignments:** Allows Lead Writers/Bid Managers to assign sections of a proposal to other PMAPS users, track assignments through completion, and report on the status of the proposal.
- **Administration:** Allows all users to change their passwords. Allows Administrators to access all Administration tools.

## Customize Dashboard and Search Module Tab Names

Administrators may change the tab label names. To change the name of a tab:

1. Right-mouse click the tab you'd like to rename; e.g. Logistics.



2. Type over the existing text to enter the new name.
3. Click [Save](#).


### ✓TIPS:


- ❖ To revert the tab name back to the PMAPS default, click on [Set to Default](#).

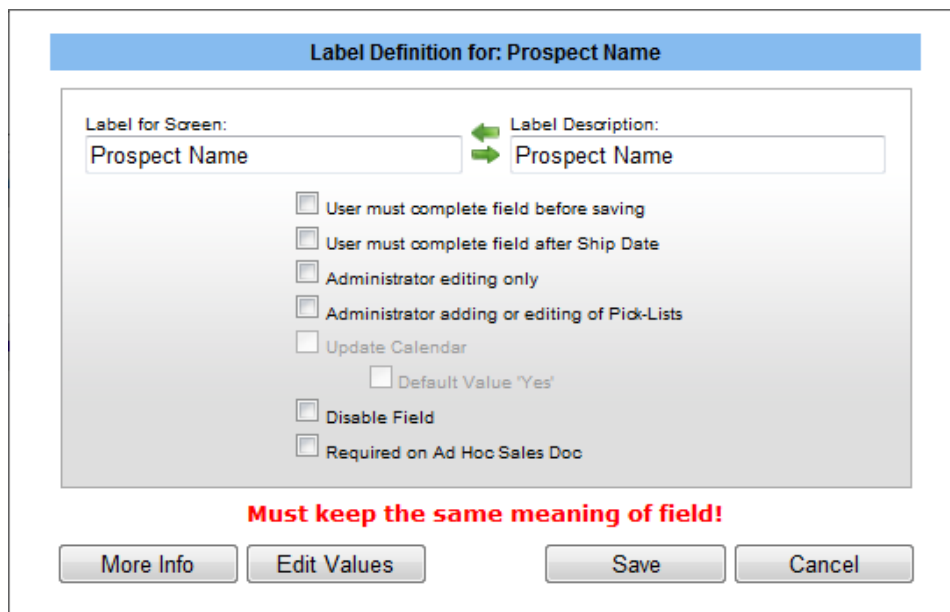
## Customize Fields

Almost every field in PMAPS is customizable to some extent. In most cases, you can change at least the field label names. In other cases you can change almost everything about the field—except the structure and the location of the field within the module.

Some fields and tabs in the database are hard coded and therefore not editable. Many of the non-editable fields contain data that is automatically being tracked or is tied in some way to other areas of the database.

How do you know which fields are editable? Look for the question  icon. If there is a question mark icon next to the field, then it is editable by an Administrator. The following edit options are available to the Administrator for each editable field in the database:

- **Label for Screen:** This is the name that is displayed on the screen and is also displayed on the list of available fields to select for customizing user views and for building reports. Use the arrows between the **Label for Screen** and the **Label Description** to copy text back and forth between the two fields.
- **Label Description:** Whatever you enter in this field, is displayed when a user passes his or her cursor over the  icon to the right of the field. This is a great place for a brief description or instruction for your users.



- **User must complete field on new RFP:** Administrators check this box for fields that need to be completed when a proposal is initially logged in. If this box is checked, the field displays a yellow background.
- **Administrator editing only:** Administrators check this box if only Administrators can edit this field after the proposal has been saved the first time.

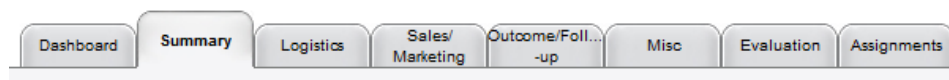
- **Administrator adding or editing of Pick-Lists:** Only Administrators can add to or edit the pick list. Currently, only Administrators are allowed to edit any pick lists in WebPro. Eventually, non-administrators, with the appropriate rights, will be able to edit some pick lists.
- **Update Calendar:** Administrators check this box for date fields that they want to appear on the internal WebPro calendar. In subsequent updates, date fields may be populated in a user's local email system through the use of ical or vcf technology.
- **Default Value 'Yes':** Automatically marks a date field complete in the PMAPS internal calendar. This feature is in development.
- **Disable Field:** If this box is checked, the field is disabled for all users.
- **Required on Ad Hoc Sales Doc:** Check this box to make fields mandatory for use of Sales Doc Builder forms.
- **Must keep the same meaning of field!:** This warning alerts the Administrator that while you may change the Label for Screen or the Label Description for this field, you must retain the original meaning of the field for internal programming, tracking and reporting purposes.
- **More Info:** This area show internal program data concerning the field:

Field Name:	ProspectName
Field Type:	DROPDOWN
Field Position:	Summary1

- **Edit Values:** Administrators and users with the appropriate rights may edit pick lists. Please refer to the User Manual for information on editing pick pick values.

## Dashboard Tabs Overview

### Summary



The **Summary** tab contains the most widely used fields of all the tracking tabs for logging in proposals. It contains the following number and types of database fields for data capture and reporting:

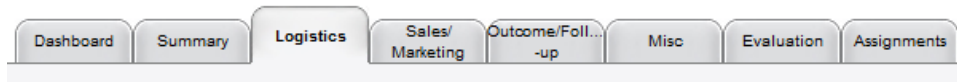
- Fourteen single-selection pick-list fields.

- Five of the fourteen single-selection pick-list fields use the same internal contacts pick-list for assigning ownership of the proposal within your organization. You may easily distinguish these fields by the contact card icon to the right of the pick-list.
- The contact field in the Consulting Firm area is not related to the internal contact list.
- One multiple selection pick-list field for products/vehicles.
- Seven date fields.
- One checkbox (declined-to-quote). Declined Proposals built-in report available.
- One text field for Proposal Name.
- One data entry field for comments or notes that is limited to 250 characters.
- One numeric value field, which can hold up to 10 numeric characters (numeric only, no letters, currency symbols, decimals or commas)

The following graphics depict the layout of the [Summary](#) tab.

<b>Basic Information</b> Client Name: <input type="text"/> Proposal Name: <input type="text"/>	<b>Consultant Information</b> Consulting Firm: <input type="text"/> Contact: <input type="text"/>
<b>Detailed Information</b> Strategy: <input type="text"/> Asset Class: <input type="text"/> Proposal Type: <input type="text"/> Estimated Revenue \$MM: <input type="text" value="0"/> Priority: <input type="text"/> Client Type: <input type="text"/> Region: <input type="text"/>	<b>Relevant Dates</b> Received: <input type="text"/> <input type="checkbox"/> Declined Date Declined: <input type="text"/> Due Date: <input type="text"/> Sales Receive: <input type="text"/> Extension: <input type="text"/> Who Extended: <input type="text"/> Reason Extended: <input type="text"/> Completed: <input type="text"/> Date Shipped: <input type="text"/>
<b>People</b> Sales Rep: <input type="text"/> Client Service Rep: <input type="text"/> Lead Writer: <input type="text"/> Portfolio Manager: <input type="text"/> Reviewer: <input type="text"/>	<b>Other Information</b> Vehicles/Products: <input type="text"/> Summary notes for reporting: <input type="text"/>

## Logistics

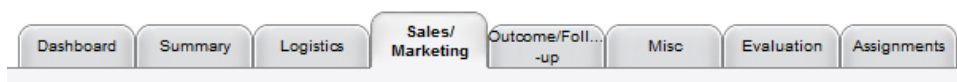


The **Logistics** tab contains the following number and types of database fields for data capture and reporting, as depicted in the graphic below:

- Seven single-selection pick-list fields.
- Seven internal contact fields, all pointing to the same pick list for assigning ownership of the proposal/project to individuals within your organization.
- One data entry field (unlimited).
- Two date fields.

The image shows two side-by-side form panels. The left panel, titled 'Logistics1', contains a 'Legal Review' pick-list field and a 'Presentation Data' section with six fields: 'Owner of Data', 'Format', 'Status (1)', 'Location', 'Date Returned', and 'Date Needed', each with a pick-list icon. The right panel, titled 'Logistics3', contains a 'General Notes' text area and an 'Other Contacts Involved with RFP' section with eight fields: 'Consultant Analyst', 'Cint Svcs Rep', 'Preparer 2' through 'Preparer 6', 'Portfolio Manager 2', and 'Reviewer Other', each with a pick-list icon.

## Sales/Marketing



The **Sales/Marketing** tab contains the following number and types of database fields for data capture and reporting, as depicted in the graphic below:

- Five check boxes.
- Thirteen numeric value field, which can hold up to 10 numeric characters (numeric only, no letters, currency symbols, decimals or commas)

- One date field that can be auto populated with an effective date.
- Two multiple-selection pick-lists for competitive differentiators and competition. Competition pick-list is linked to Follow-up Tab (Who Won).

<b>Consultant Updates</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Disk</li> <li><input type="checkbox"/> Hnd-Copy/Fax</li> <li><input type="checkbox"/> Internet</li> <li><input type="checkbox"/> CD</li> <li><input type="checkbox"/> e-Mail</li> </ul>	<b>Totals used for Reporting</b> <ul style="list-style-type: none"> <li>Number of Qnn: 0</li> <li>Num PMAPS: 0</li> <li>Non PMAPS: 0</li> <li>Num Sections: 0</li> </ul>
<b>Number of Copies</b> <ul style="list-style-type: none"> <li>Proposal Team: 0</li> <li>In-House: 0</li> <li>Consultant: 0</li> <li>Client: 0</li> <li>Other: 0</li> </ul>	<b>Stats for Proposal</b> <ul style="list-style-type: none"> <li>Effective Date: </li> <li># of Members: 0</li> <li>Elg. Actives: 0</li> <li>Number of Retirees: 0</li> <li>Elg. Retirees: 0</li> </ul>
<b>Marketing5</b> <p>Competitive Advantages:</p>	<b>Marketing6</b> <p>Competition:</p>

## Outcome/Follow-up

Dashboard	Summary	Logistics	Sales/Marketing	Outcome/Foll...-up	Misc	Evaluation	Assignments
-----------	---------	-----------	-----------------	--------------------	------	------------	-------------

The Outcome/Follow-Up tab contains the following number and types of database fields for data capture and reporting:

- One internal contact field.
- Six date fields.
- Two check boxes.
- Two single-selection pick-list fields.

- Seven data entry fields.

The screenshot displays four distinct data entry panels in a grid layout. Each panel has a title bar with a question mark icon.

- Consultant Qtrly Update:** Contains fields for 'Responsible:' (dropdown), 'Date Assembled:' (calendar), 'Date Proofed:' (calendar), and 'Date Formatting:' (calendar). It also includes two checkboxes: 'Spelling' and 'Remove Links'.
- Delivery Information:** Contains fields for 'How Shipped:' (dropdown), 'Tracking Number:' (text), 'Ship Date:' (calendar), and a large text area for 'Shipping Instructions:'.
- RFP Status:** Contains fields for 'Status:' (dropdown), 'Who Won:' (dropdown), 'Reason (if lost):' (text), and a large text area for 'File Location:'.
- Follow-up Information:** Contains fields for 'Follow-up:' (calendar), 'To Do:' (text), 'De-brief:' (calendar), and a large text area for 'De-brief Information:'.

## Miscellaneous

The screenshot shows a horizontal navigation bar with several tabs: 'Dashboard', 'Summary', 'Logistics', 'Sales/Marketing', 'Outcome/Follow-up', 'Misc' (which is highlighted with a darker background), 'Evaluation', and 'Assignments'.

The **Miscellaneous** tab is represented below in two graphics and contains the following number and types of database fields for data capture and reporting:

- Sixteen single-selection pick lists.
- Nine Address fields.
- Three check boxes.
- Twelve date fields.
- One data entry field.
- Five numeric value field, which can hold up to 10 numeric characters (numeric only, no letters, currency symbols, decimals or commas)

- Five internally populated tracking fields.

General Fields	Additional Information
User 1: <input type="text"/>	<input type="checkbox"/> Additional Reports
User 2: <input type="text"/>	<input type="checkbox"/> Not in use (1)
User 3: <input type="text"/>	<input type="checkbox"/> Not in use
User 4: <input type="text"/>	
User 5: <input type="text"/>	
User 6: <input type="text"/>	
Address	Additional Dates
Attention: <input type="text"/>	Date Needed (1): <input type="text"/>
Email: <input type="text"/>	Date Received: <input type="text"/>
Address1: <input type="text"/>	Unique ID: <input type="text"/>
Address2: <input type="text"/>	PMAPS ID: <input type="text" value="NA"/>
City: <input type="text"/>	Last Edited: <input type="text" value="2/28/2013"/>
State: <input type="text"/>	Date Entered: <input type="text" value="11/16/2005"/>
Zip: <input type="text"/>	Who Last Edited: <input type="text" value="SNH"/>
Country: <input type="text"/>	Date Doc Locked: <input type="text"/>
Phone: <input type="text"/>	Who Edited Doc: <input type="text"/>
	Started On: <input type="text"/>



User Dropdowns	User Dates
Mark's Field: <input type="text"/>	USERDATE1: <input type="text"/>
UserDropdown2: <input type="text"/>	USERDATE2: <input type="text"/>
UserDropdown3: <input type="text"/>	USERDATE3: <input type="text"/>
UserDropdown4: <input type="text"/>	USERDATE4: <input type="text"/>
UserDropdown5: <input type="text"/>	USERDATE5: <input type="text"/>
UserDropdown6: <input type="text"/>	USERDATE6: <input type="text"/>
UserDropdown7: <input type="text"/>	USERDATE7: <input type="text"/>
UserDropdown8: <input type="text"/>	USERDATE8: <input type="text"/>
UserDropdown9: <input type="text"/>	USERDATE9: <input type="text"/>
UserDropdown10: <input type="text"/>	USERDATE10: <input type="text"/>

User Numbers
USERNUMBER1: <input type="text"/>
USERNUMBER2: <input type="text"/>
USERNUMBER3: <input type="text"/>
USERNUMBER4: <input type="text"/>
USERNUMBER5: <input type="text"/>

## Evaluation

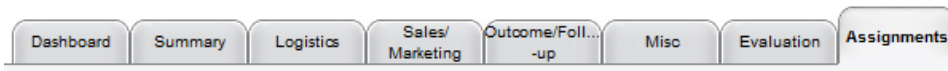
Dashboard	Summary	Logistics	Sales/Marketing	Outcome/Follow-up	Misc	<b>Evaluation</b>	Assignments
-----------	---------	-----------	-----------------	-------------------	------	-------------------	-------------

The Evaluation tab contains the following number and types of database fields for data capture and reporting:

- One date field.
- Ten single-selection pick-list fields.

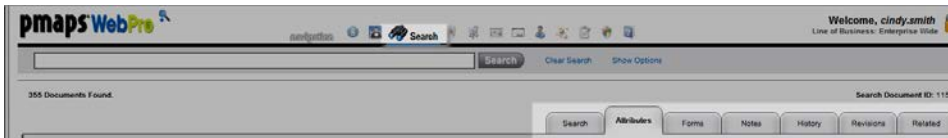
- Three multiple-selection pick-list fields.

## Assignments



The Assignment tabs is used to track RFP Assignments made to users for the selected proposal. Please refer to our User Manual for more information on the RFP Assignments tool.

## Customizing the Attributes Tab - Search Module




This tab is designed to capture information pertaining to each database record for purposes of categorization and updating. The [Attributes](#) tab consists of:

- Eleven single-selection pick-list fields.
- Four internal contact fields.
- Two date fields.
- Two data entry fields.

- Two multiple-selection pick-list fields.

<b>Status</b> <div> Document Status: <input type="text"/> Region: <input type="text"/> SME: <input type="text"/> Back-up SME: <input type="text"/> </div>	<b>Compliance</b> <div> Review Cycle: <input type="text"/> Date Expires: 3/14/2014 Date Last Verified: <input type="text"/> Verified By: <input type="text"/> </div>
<b>Basic Information</b> <div> Department: <input type="text"/> Main Topic: <input type="text"/> Sub Topic: <input type="text"/> Summary: <input type="text"/> Language: <input type="text"/> Source: <input type="text"/> Prompt on Insert: <input type="text"/> Type: Q&amp;A Document </div>	<b>Other Information</b> <div> Vehicle: <input type="checkbox"/> All Vehicles <input type="checkbox"/> Commingled Fund <input type="checkbox"/> Commingled or Separate <input type="checkbox"/> International Fund Strategy: <input type="checkbox"/> * All Equity <input type="checkbox"/> * All Intermediate <input type="checkbox"/> * All Strategies <input type="checkbox"/> Active International Sales Contact: <input type="text"/> Consulting Firm: <input type="text"/> Original Proposal: <input type="text"/> </div>

## Search Attribute – Global Attributes

Administrators may make mass updates to database records using the  **Global Attributes** tool in the [Search Module](#). This function is now available to Writer licensees as well, as outlined in the Permissions and Restrictions section of this manual.

To make global updates:

1. Make sure all the records you want to update are displayed in the search results grid. Apply one or more filters to narrow down the search results to just the records you want to change.

For example, if you want to change all of the records that are owned to SME1 to SME2, first make sure that SME2 has been added to the pick list. Then, make sure only the records for SME1 are displayed in the search results grid.

2. Click on the [Global Attributes](#) icon on the icon bar directly above the hypertext field.

A blank attributes tab is displayed. The number of records that will be affected by the change is displayed in the upper left-hand corner of the screen as well as on the [Save](#) button at the bottom right-hand corner of the screen.

The screenshot shows a web-based form for updating global attributes. It is organized into four main sections, each with a title bar and a help icon (question mark):

- Status:** Contains dropdown menus for Document Status, Region, SME, and Back-up SME.
- Compliance:** Contains dropdown menus for Review Cycle, Date Expires, Date Last Verified, and Verified By.
- Basic Information:** Contains dropdown menus for Department, Main Topic, Sub Topic, Language, Source, Prompt on Insert, and Type, along with a text area for Summary.
- Other Information:** Contains checkboxes for Vehicle (All Vehicles, Commingled Fund, Commingled or Separate, International Fund), Strategy (\* All Equity, \* All Intermediate, \* All Strategies, Active International), Sales Contact, Consulting Firm, and Original Proposal.

At the bottom of the form, there are two buttons: "Save attributes for 355 documents" and "Cancel".

3. Select the field or fields you want to update.
4. Click the [Save](#) button.

#### ✓ TIPS

- ❖ This will [not](#) overwrite any fields with blanks. It will only change the fields you fill out on this global attributes tab.

## ADMINISTRATION MODULE

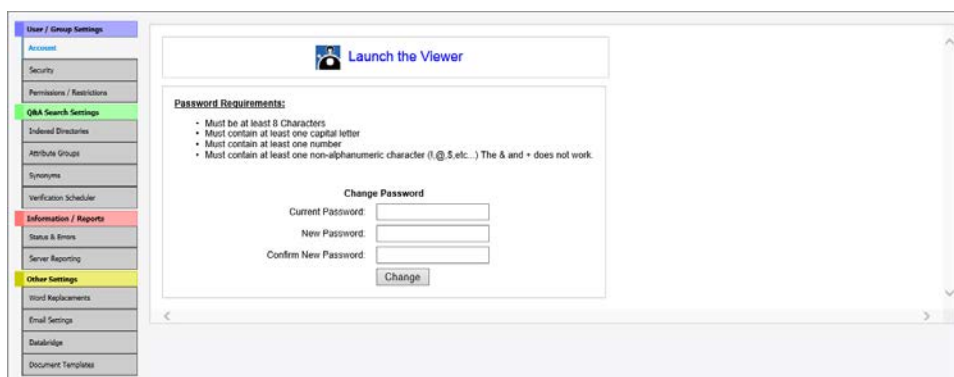
Access to the Administration Module is limited to users who hold Administrator licenses. Other users will click on the [Administration](#) link to change their password, but will not have access to any of the other functions outlined in this section. Other users can be permitted Administrator level functions for specific modules such as the Assembly Center. Please refer to [Permissions/Restrictions](#) section of this document for more information.



## User/Group Settings

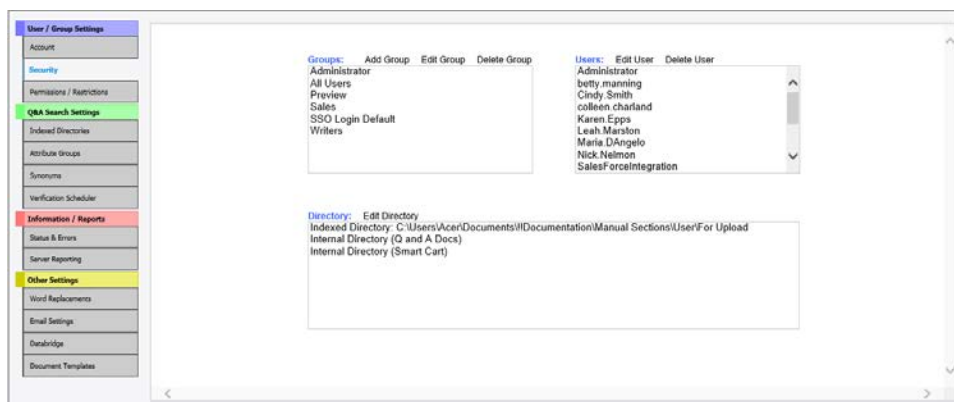
### Account

From the Account menu, you can change your login password and Launch the Viewer. All PMAPS users can access the Account menu.



### Security

The Security menu provides Administrators options for user groups, users and directories.



### User Groups

Administrators can create user groups to manage permissions, viewing and editing restrictions for database content and also viewing restrictions for the Dashboard. Some groups such as Administrator will already exist as these are set up as part of your initial application.

#### Adding Groups

To add a group, click the Add Group link and follow the steps below:

1. Enter a name for the group; e.g., Marketing.

2. Click the Add button to select the users who belong to the group.
3. Assign Permissions by checking the appropriate box:
  - None – no access to content
  - Only Compliant – access only to content marked Compliant
  - Compliant & Non-Compliant – access to all content

#### ✓ TIPS

- ❖ If you do not have Editing rights, you cannot update PMAPS with records returned to the SmartCart.

4. Click Save.

### *Editing Groups*

To edit a group:

1. Highlight the group name.
2. Click Edit Group.
3. Make changes.
4. Click Save.

### *Deleting Groups*

1. Highlight the group name
2. Click Delete Group link.

## **Users**

Administrators can manage user access, including editing the user's password, email address, line of business, employee name and document rights. If Proposal Software is hosting your application, a Proposal Software representative will need to assist you to add, edit, or remove a user name. Email your request to add or remove users to [support@proposalsoftware.com](mailto:support@proposalsoftware.com) and include the first and last name and email address for the users you wish to add/remove.

If your application is installed you may have Super Admin rights. Please see Appendix: Super Admin for more details about adding and editing users. If you need to change the user name, and you have a Super Admin license (you are not hosted by PSI), you must inactivate the user by entering the zzz\* prefix to the first name of the contact.

### *Editing Users*

To edit a user:

1. Highlight the user's name from the window.
2. Click the Edit User link. The User Manager window will open.

The screenshot shows the 'User Manager' window. On the left, there are input fields for 'Name' (Cindy Smith), 'Password' (blank), 'Confirm Password' (blank), 'Email Address' (betty.manning@proposalsoft), 'Line of Business' (Enterprise Wide), 'Employee Name' (Smith, Cindy), and 'Auto-Login Identity' (blank). Below these are three checkboxes: 'Training Mode', 'Account Locked', and 'SSO Login Only'. On the right, there is a 'Groups' section with a list containing 'Administrator' (selected with an 'X') and 'All Users'. Below the groups is a 'Password Requirements' section with a bulleted list: 'Must be at least 8 Characters', 'Must contain at least one capital letter', 'Must contain at least one number', and 'Must contain at least one non-alphanumeric character (!, @, \$, etc...)'. A note states 'The & and + does not work.' At the bottom, there is a 'Search Permissions' section with 'Document Rights' and three radio buttons: 'None', 'Only Compliant', and 'Everything' (selected). At the bottom right are 'Save' and 'Cancel' buttons.

3. From the User Manager screen you can:

Reset the user's password by typing in a new password and confirming it in the second field.

### *Unlock User Login Accounts*

One of the most common user errors is an unsuccessful login resulting in their account being locked. If a user attempts to log in three times unsuccessfully, their account will become locked.

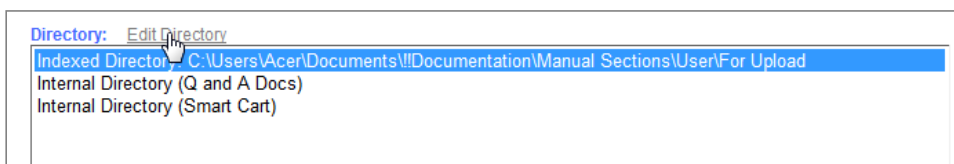
To unlock the user's account:

1. Navigate to the [Security](#) tab of the Administration module.
2. Select the user's name on the user list and click [Edit User](#).
3. Look at the checkboxes at the bottom of the upper-left quadrant. The Account Locked checkbox will be checked.
4. Uncheck the [Account Locked](#) box.
5. Click Save.

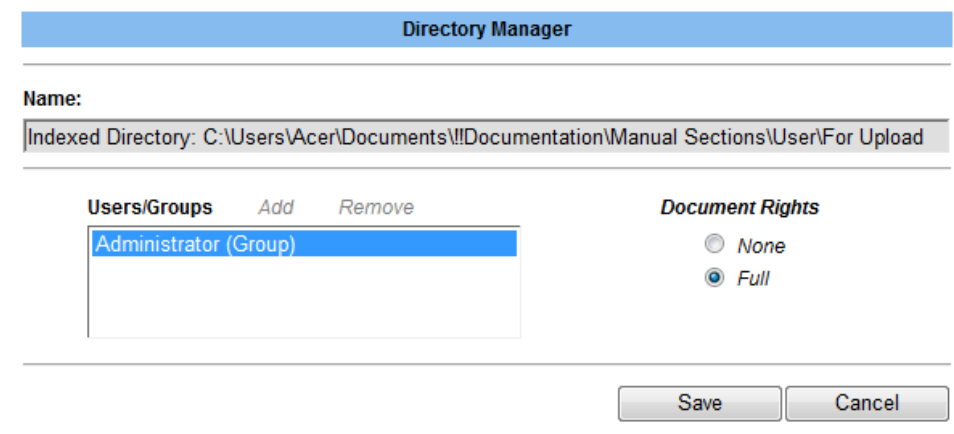
## Directories

The Administrator manages access to all Indexed Directories from this area. Once a directory has been created, the Administrator will locate the directory in the list and determine which users or user groups have permission to view the directory in the Search module.

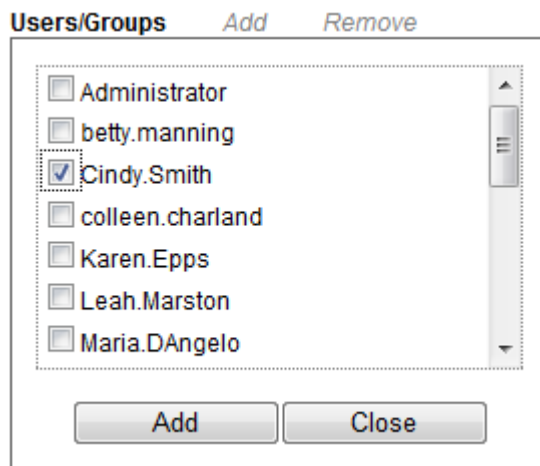
1. To edit a directory, highlight the directory and click the Edit Directory link.



The Directory Manager window will open.



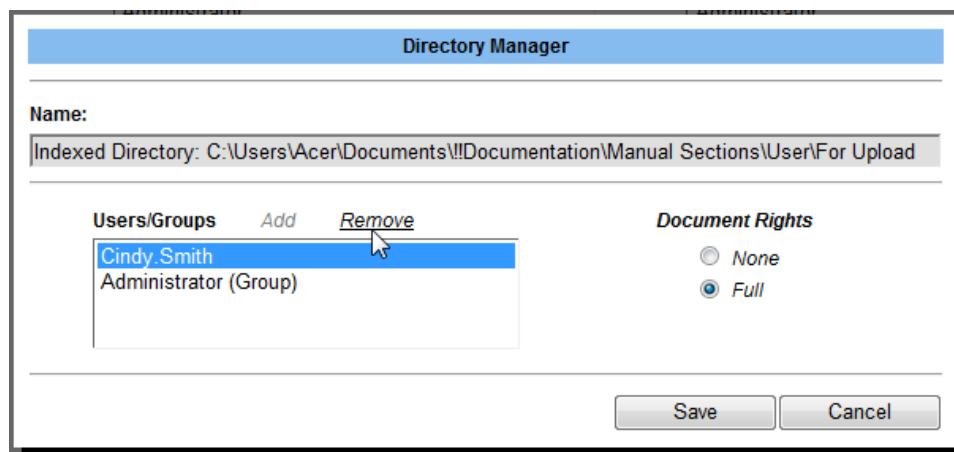
2. To add groups or individual users, click [Add](#). The window expands to show all available users and groups, with the groups shown in the bottom of the list.





Check the box next to the user or group name(s) you wish to add to the directory. Then click the [Add](#) button.



3. Next, click on the new user(s) or group(s) added (select multiple by holding down the CTRL key while selecting) and assign document permissions. You have two options:
  - None – no access to content in this directory
  - Full – access to content in this directory
4. Click [Save](#).
5. To [Remove](#) permissions, highlight the user or group in the list and click the Remove link.







## Permissions/Restrictions

The Administrator can assign individual User or Group Permissions/Restrictions to various tools from this screen.

User / Group Settings																						Restrictions		
Account																						Viewing		File Type Permissions
Security																						Editing		
Permissions / Restrictions																								
QRA Search Settings																								
Indexed Directories																								
Attribute Groups																								
Synonyms																								
Verification Scheduler																								
Information / Reports																								
Status & Errors																								
Server Reporting																								
Other Settings																								
Word Replacements																								
Email Settings																								
Databases																								
Document Templates																								
User / Group	Add Documents	Add Proposals	Assembly Ctr Admin	Basic Editing	Build Sales Docs	Calendar Admin	Custom Report Admin	Dashboard Admin	Delete Documents	Delete Proposals	Edit Documents	Edit Proposals	Fill Out Sales Docs	Multiple Doc Download	Multiple Doc Upload	Multiple Global Attributes	Run Verify Process	Sales Docs In Word	Smart Cart Admin	Unlink Proposals				
Administrator																								
betty.manning																								
Cindy.Smith																								
colleen.charland																								
Karen.Epps																								
Leah.Marston																								
Maria.DAngelo																								
Nick.Nelson																								
lesForceIntegration																								
Steven.Wexler																								

To change a permission, simply click the icon to turn the permission “on”  or “off” 

#### ✓ TIPS

- ❖ Hovering over the **User** or **Group** name highlights the name and rights on the grid.
- ❖ Hovering over the icons  or  on the User or Group row highlights the tool in the grid heading.
- ❖ When the  is visible, the user or group **is permitted access** to the tool or feature shown at the top of the column.
- ❖ When the  is visible, the user or group **does not have access** to the tool or feature shown at the top of the column.

## PMAPS WebPro User Permissions By License Type

There are four types of user licenses available in WebPro:

### *Administrator*

- All permissions enabled
- View, add, and edit rights to all tracking data
- View, add and edit rights to all content
- Can apply restrictions
- View and edit rights to all tracking data field labels and definitions
- Can control each tracking data field as follows:
  - ❖ Make mandatory for new entries or edit of existing entries
  - ❖ Make mandatory after Date Shipped field completed
  - ❖ Disable from use
  - ❖ Allow/Deny users to edit
  - ❖ Allow/Deny users to add to and edit values
- View and edit rights to all search content data field labels and definitions
- Can control each search data field as follows:

- ❖ Make mandatory for new entries or edit of existing entries
- ❖ Disable from use
- ❖ Allow/Deny users to edit
- ❖ Allow/Deny users to add to and edit values

### *Writer*

- View, add, and edit rights to tracking data as permitted by Administrator
- View, add and edit rights to content as permitted by Administrator
- Administrator level access to specific modules such as Assembly Center and SalesDoc Builder as permitted by Administrator

### *Sales (not available for Web Essentials)*

- View, add and edit rights to tracking data as permitted by Administrator
- View rights to content as permitted by Administrator
- SalesDocBuilder
  - ❖ Assemble in PDF default
  - ❖ Assemble in Word if permitted by Administrator
- Assembly/Project Center
  - ❖ Assemble in PDF default

### *Preview Only*

- View access to content as permitted by Administrator

## **PMAPS WebPro Permissions Definitions**

Add Documents
Add Proposals
Assembly Ctr Admin
Basic Editing
Build Sales Docs
Calendar Admin
Custom Report Admin
Dashboard Admin
Delete Documents
Delete Proposals
Edit Documents
Edit Proposals
Fill Out Sales Docs
Multiple Doc Download
Multiple Doc Upload
Multiple Global Attributes
Run Verify Process
Sales Docs In Word
Smart Cart Admin
Unlock Proposals

- **Add Documents:** Allows user to add new records (Q&A/content) in the Search module. Activates the **Add Document** button to the user's toolbar in the Search module.



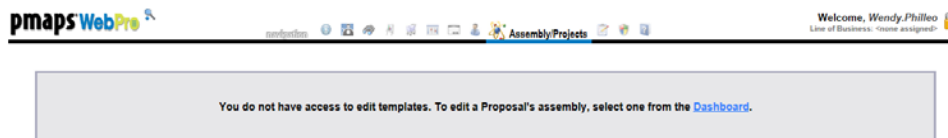
- **Add Proposals:** Allows user to add new proposals to the Dashboard. This includes uploading the proposal document to the cloud. Activates the **Add Proposal** button to the user's toolbar in the Dashboard.



- **Assembly Ctr Admin:** Allows user to manage Assembly Center templates.



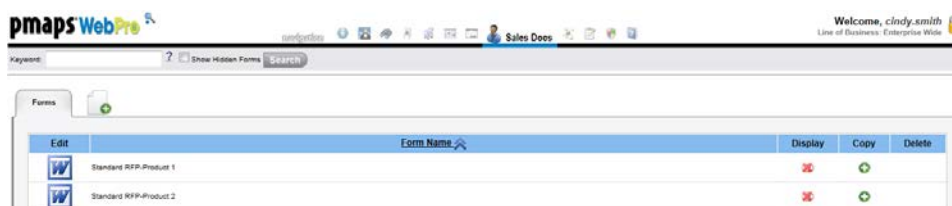
If not permitted, users will see the following when they attempt to enter the Assembly Center template area:



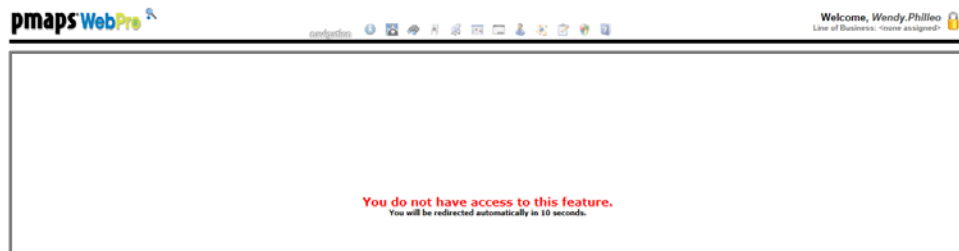
- **Basic Editing:** Allows users to access all standard icons not listed on this form. The ONLY user that should not have this feature checked is the PREVIEW ONLY role.



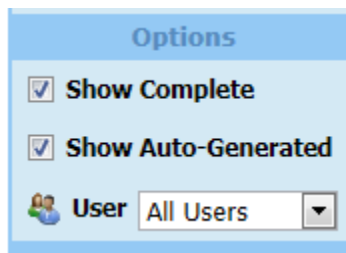
- **Build SalesDocs:** Allows user to create new SalesDoc templates. When enabled, users can access the "build" area by clicking on the SalesDoc icon from the top Navigation bar. When disabled, a message will be displayed saying the feature is unavailable if a user who does not have permission to the function clicks on the icon.



If not permitted, users will see the following:



- **Calendar Admin:** Allows user to see/manage all users' calendars. Users with Calendar Admin permission have access to a drop down menu that allows them to change their calendar view to all users or to any individual user.



- **Dashboard Admin:** Allows user to make administrative changes to the tracking Dashboard fields and tabs. Please see the section on Customization Options for more details.
- **Delete Documents:** Allows user to delete records in the Search module.



- **Delete Proposals:** Allows user to delete proposals in the proposal tracking (Dashboard) module.



- **Edit Documents:** Allows user to edit existing records in the Search module.



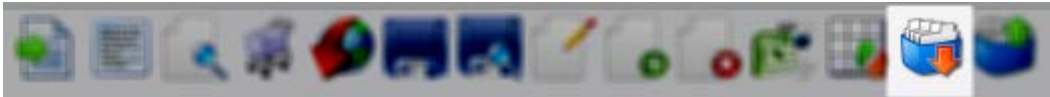
- **Edit Proposals:** Allows users to edit proposals in the Dashboard module.



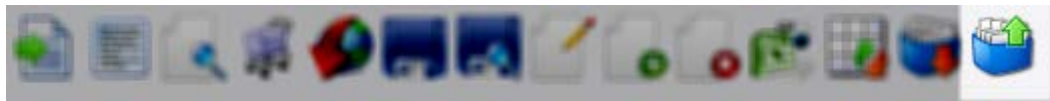
- **Fill Out SalesDocs:** Allows user to build new SalesDocs from the proposal tracking (Dashboard) module.



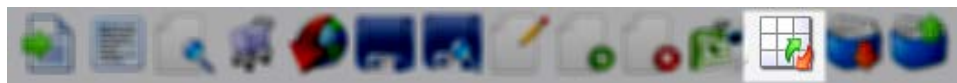
- **Multiple Doc Download:** Allows users to Download/Checkout individual documents in the Search module.



- **Multiple Doc Upload:** Allows users to Upload Documents they have checked out and edited offline or Upload New Documents in bulk.



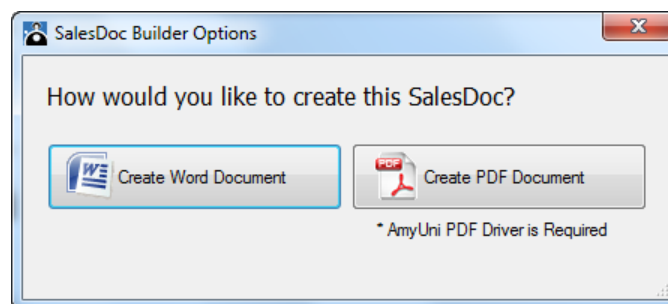
- **Multiple Global Attributes:** Formerly available to only Administrator licensees, the Multiple Global Attributes permission allows users to make mass changes to Attributes for a filtered group of records, for example, changing the Subject Matter Expert for an entire Main Topic.



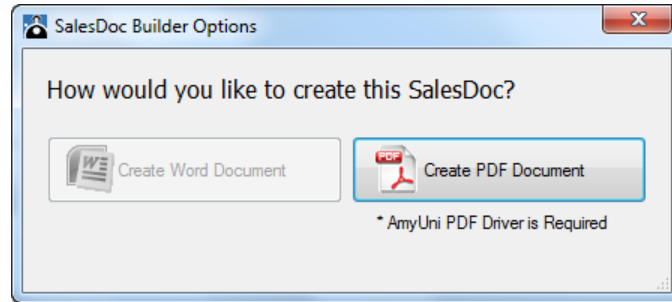
- **Run Verify Process:** Allows user to request compliance (verification) for multiple records from the Search module.



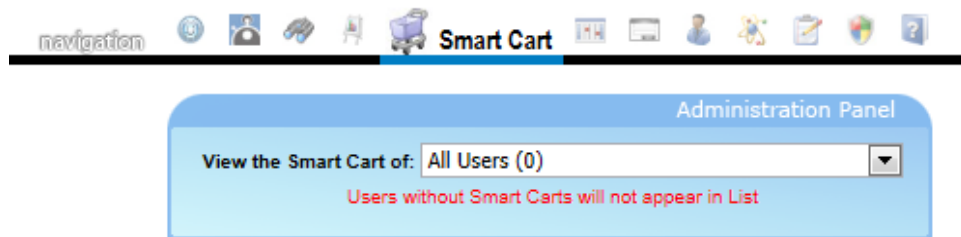
- **SalesDocs In Word:** For users who have the Fill Out SalesDocs permission enabled, allows building of SalesDocs using Word.



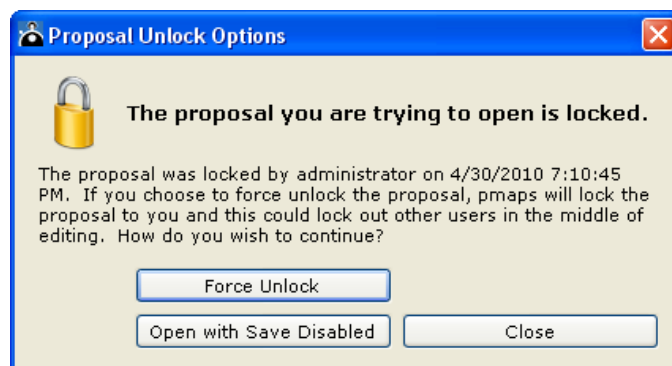
If not permitted the Create Word Document option is unavailable:



- **SmartCart Admin:** Allows user to see/manage all users' SmartCart activities. An Administrator panel become visible when users with this permission enter the SmartCart that allows the user to view items in all users' SmartCarts, or view only a specific user's items.

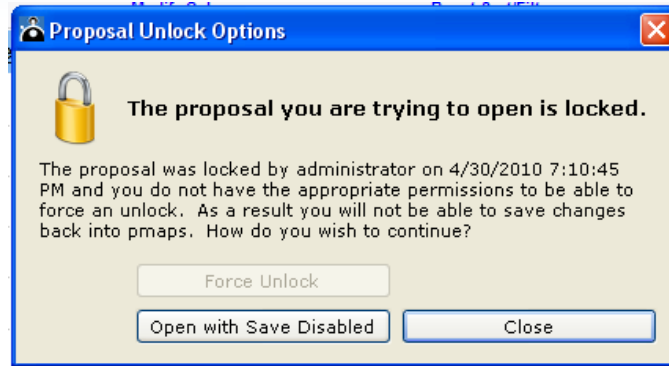


- **Unlock Proposals:** Allows user to **Force Unlock** any proposal document that has previously been locked through the **Checkout** process. Users without this permission enabled can only open without the option to save to the cloud. This activates the Force Unlock button in the Proposal Unlock Options and when enabled the user will receive the following prompt:



If not permitted, the Force Unlock option is unavailable:






## Restrictions

Administrators have the ability to restrict access Dashboard (proposal) and Search (Q&A) content using values contained in the data fields (attributes) in each Module. You can restrict users from editing proposals and/or Q&As, or you can restrict users from viewing the proposals or Q&As you specify entirely.

### *Adding Restrictions*

To add a restriction:

1. Click on the  icon in either the [Viewing](#) or [Editing](#) column, on the row of the user or group for which you wish to add the restriction.
2. The Add Restriction screen will open and you will first need to select the type of restriction you want to apply, either [Q&A Documents](#) – your database content – or [Proposals](#) – your Dashboard.

3. Once you have selected the type, the appropriate data fields, or attributes, will be available in the [Select Attribute](#) drop down pick list. Click the down arrow on the field and select the attribute you wish to use from the pick list.
4. Now select an Operator. Once again, the options shown will be determined by your previous selections, so only operators which apply to the type of attribute you have selected will be available.



4. Now, select a value. In this example, we chose Cindy Smith. We can now see the number of results that would be visible to the user or group for which we created the restriction. Based on our selections, we are restricting this user or group to view only the 30 records for which Cindy Smith is assigned.

5. Click [Save](#).

#### ✓ TIPS

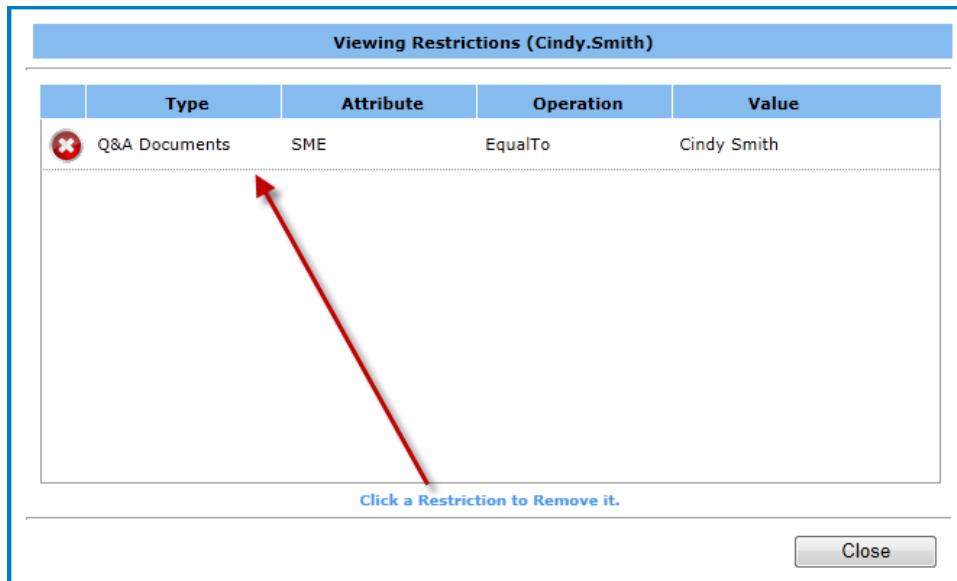
- ❖ [You can restrict access to any data field you choose](#) – The above steps reflect just one example in which we chose to restrict viewing access to only Q&A Documents assigned to a specified SME. You may need to create restrictions based on specific regions or sales teams or lines of business, for example.
- ❖ [When adding a restriction, remember that you are restricting TO a specific data field.](#) If you want a user or group to have access to a single value (i.e. SME Cindy Smith), you would select the [Equals](#) operator. If you wish to restrict the view to everything EXCEPT a certain value – if we wanted the users to see all content EXCEPT that which was assigned to Cindy Smith, we would select the [Not Equal To](#) operator.
- ❖ The screen shots in the above steps reflect adding a Viewing restriction. The steps are exactly the same for adding an Editing restriction.

#### *To Delete a Restriction:*

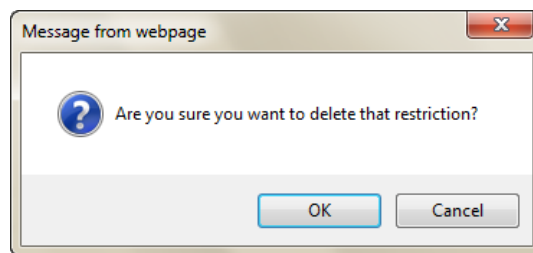
1. In the Permissions/Restrictions area, locate the user or group. In this example, we have chosen Cindy.Smith.



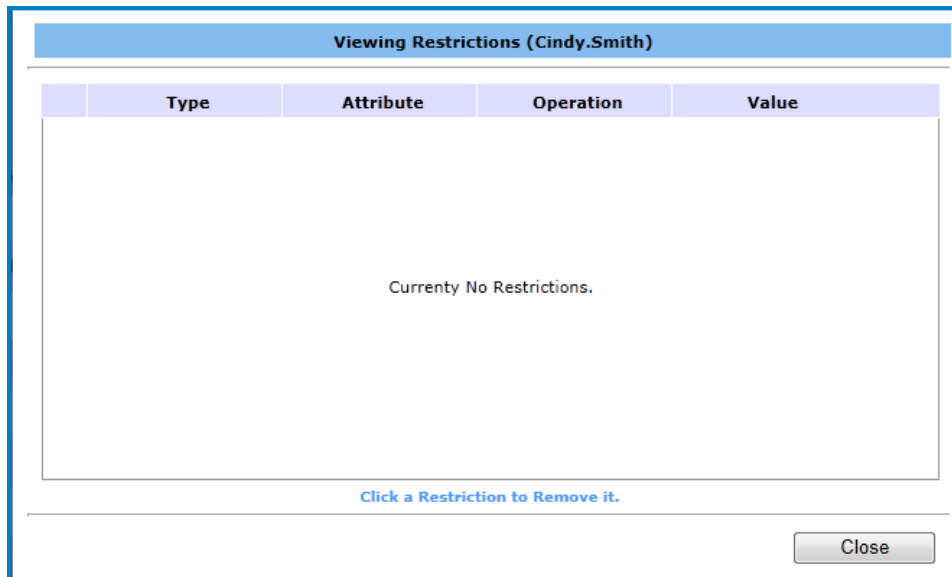
2. Select the restriction list by clicking on the [1]. The list of restrictions is displayed.



3. Click anywhere on the restriction you want to remove.
4. Click OK to confirm that you want to delete the selected restriction.



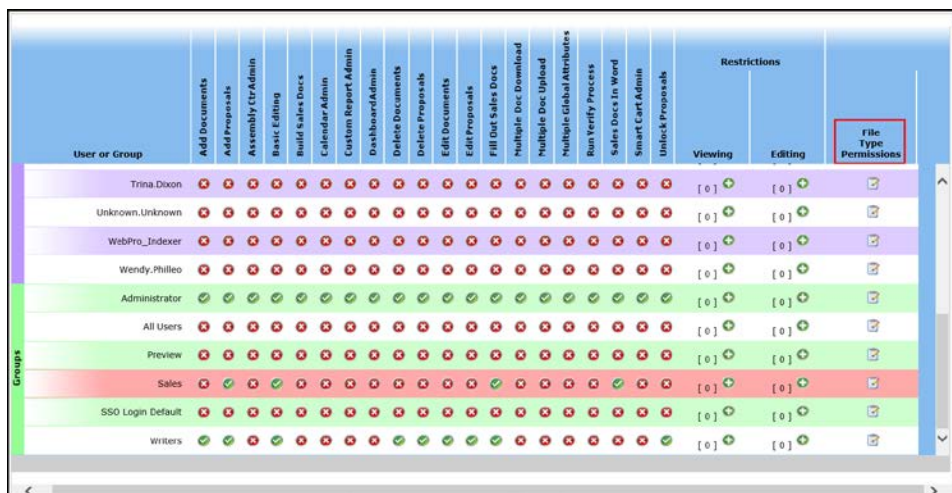
The restriction is removed. A confirmation box is displayed.



## File Type Permissions

By default, only Administrators have permission to add new documents, including Word Q&A documents. The Administrator will have to edit the Permissions to allow non-Administrator users to add new records by file type. To do this:

1. Click on Administration and go to the Permissions/Restrictions tab.
2. Locate the user or group of users with Add Document enabled and then click the icon under the File Type Permissions column.

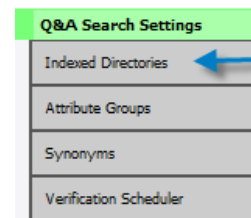


3. Check each file type you would like the user or group of users to be able to add. A green check means the user may add that file type and a red x means the user may not add that file type.

## Q&A Search Settings

### Indexed Directories (Not available for Web Essentials)

From the [Indexed Directories](#) tab, the Administrator can create directories to index content from local environments and SharePoint. To use Indexed Directories, The PMAPS® WebPro Indexer would need to be installed by your IT department and will need access to any directories (folders) that you wish to index.



The [Indexed Directories](#) tab allows you to add new directories and displays all that have been created. Click [Edit](#) to manage an existing directory. Click [Delete](#) to remove the directory.

Click To Open In New Window

Add New Directory

Is SharePoint	UNC Path / SharePoint Url	Last Scanned	Enabled	Indexer ID		
<input type="checkbox"/>	C:\Leslie indexed files	2/15/2012 3:23:46 PM	<input checked="" type="checkbox"/>	Leslie_Comp	Edit	Delete
<input type="checkbox"/>	C:\users\Helen\my docs\Helen Indexed Folders	1/1/2000 12:00:00 AM	<input type="checkbox"/>	Helen	Edit	Delete
<input type="checkbox"/>	C:\temp\marketing	7/17/2012 1:31:59 PM	<input type="checkbox"/>	Steven	Edit	Delete
<input type="checkbox"/>	C:\Users\User11\Documents\Indexer	2/29/2012 4:32:22 PM	<input checked="" type="checkbox"/>	Wendy	Edit	Delete
<input type="checkbox"/>	C:\WebProDocs	2/11/2012 4:01:23 PM	<input checked="" type="checkbox"/>	Charland	Edit	Delete
<input type="checkbox"/>	C:\Acme RFP\	7/20/2012 10:02:58 AM	<input type="checkbox"/>	Steven	Edit	Delete
<input type="checkbox"/>	c:\IndexedFolders\	1/1/2000 12:00:00 AM	<input checked="" type="checkbox"/>	Betty_64Bit	Edit	Delete
<input checked="" type="checkbox"/>	http://sharepoint.proposalsoftware.com	7/26/2012 8:18:18 PM	<input checked="" type="checkbox"/>	Steven	Edit	Delete
<input type="checkbox"/>	C:\Users\Helen\Documents\Helen Indexed folder	7/16/2012 9:57:48 AM	<input checked="" type="checkbox"/>	Helen	Edit	Delete
<input type="checkbox"/>	C:\Proposal Software\Leslie Hatcher\Search Accelerator	5/12/2012 12:26:58 PM	<input checked="" type="checkbox"/>	Leslie_Comp	Edit	Delete

### Add New Directory:

1. Go to the Administration tab and select the Indexed Directories tab then Add New Directory.
2. Select the type of Directory:
  - UNC/Web
  - Microsoft SharePoint

Now, follow the steps below for the directory type you have selected.

#### *UNC Directory*

3. For the first field, UNC Directory, enter the location of the folder on your computer which you would like to be indexed. If uncertain of the exact path, copy the entire path from Windows Explorer.

4. Make sure to check Store Files on Web Server Enabled to allow those files to be uploaded into the web server.
5. IMPORTANT! Select the Indexer attribute (highlighted in yellow).
6. Complete any other attributes you deem appropriate. It is suggested that you select your name from the SME field.
7. Click the Save button.

## Microsoft SharePoint Directory

Directory Type: ☐ UNC / Web ☒ Microsoft SharePoint

---

SharePoint Url:

SharePoint Domain:

SharePoint Login:

SharePoint Password:  [Refresh Lists](#)

(your password is saved, but not shown)

---

SharePoint Lists:

- / - List Template Gallery
- / - Master Page Gallery
- / - Shared Documents
- / - Site Assets
- / - Site Pages
- / - Solution Gallery
- / - Style Library
- / - Theme Gallery
- / - Web Part Gallery

3. Enter the SharePoint Url, domain, login and password.
4. Click [Refresh Lists](#).

## Providing Access to Directories

Now, you will provide access to the directories to users/user groups.

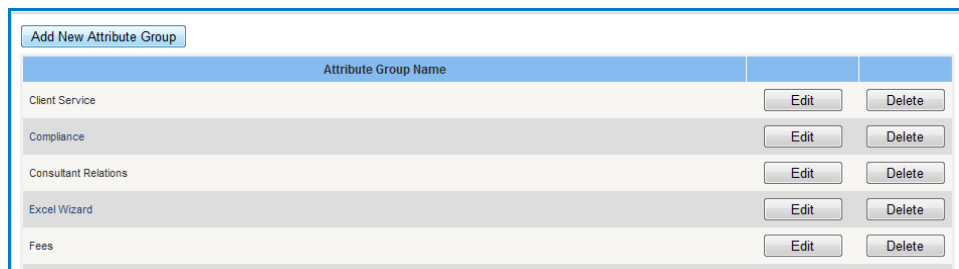
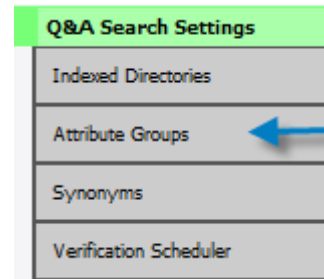
1. Click the [Security](#) tab and look for [Directory](#).
2. Highlight the directory you created in Step 8 and then click the [Edit Directory](#) link.
3. Click the [Add](#) button, select all users or user group you wish to have access to the directories and click [Add](#).
4. Highlight the user/user group names you added and click the [Full](#) radio button under [Document Rights](#) then [Save](#).
5. Repeat this process to add any other desired UNC or Microsoft SharePoint Directories.

## Attribute Group Manager

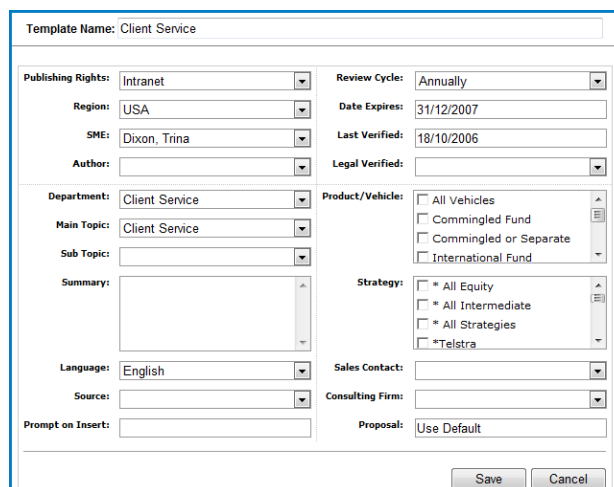
Administrators have the ability to add, edit or delete attribute groups.

### Editing Attribute Groups

1. Navigate to the Administration module.
2. Under Q&A Search Settings, click Attributes Groups.
3. Click Edit on the appropriate line item.

A screenshot of the 'Add New Attribute Group' dialog box. At the top left is a button labeled 'Add New Attribute Group'. Below it is a table with three columns: 'Attribute Group Name', 'Edit', and 'Delete'. The table contains five rows: 'Client Service', 'Compliance', 'Consultant Relations', 'Excel Wizard', and 'Fees'. Each row has an 'Edit' button and a 'Delete' button to its right.

4. The Attribute Template is displayed.

A screenshot of the 'Attribute Template' dialog box. The 'Template Name' field is set to 'Client Service'. The dialog is divided into several sections. The 'Publishing Rights' section has a dropdown set to 'Intranet'. The 'Region' dropdown is set to 'USA'. The 'SME' dropdown is set to 'Dixon, Trina'. The 'Author' field is empty. The 'Review Cycle' dropdown is set to 'Annually'. The 'Date Expires' field is set to '31/12/2007'. The 'Last Verified' field is set to '18/10/2006'. The 'Legal Verified' field is empty. The 'Department' dropdown is set to 'Client Service'. The 'Main Topic' dropdown is set to 'Client Service'. The 'Sub Topic' dropdown is empty. The 'Summary' field is a text area. The 'Language' dropdown is set to 'English'. The 'Source' dropdown is empty. The 'Prompt on Insert' field is empty. The 'Product/Vehicle' section has a list box with four options: 'All Vehicles', 'Commingled Fund', 'Commingled or Separate', and 'International Fund'. The 'Strategy' section has a list box with four options: '\* All Equity', '\* All Intermediate', '\* All Strategies', and '\* Telstra'. The 'Sales Contact' dropdown is empty. The 'Consulting Firm' dropdown is empty. The 'Proposal' field is set to 'Use Default'. At the bottom right are 'Save' and 'Cancel' buttons.

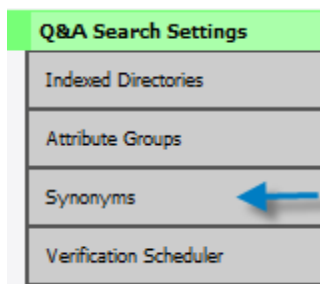
5. Make changes.
6. Click Save. The changes are applied going forward, but do not update past records. Use the [Global Attributes Tool](#) feature to change past records.

## SYNONYMS

The Synonyms menu allows administrators easy access to their user-defined synonym library. It allows you to create new synonyms and maintain existing ones. Synonyms aid database users in finding information in your database more quickly.

### Adding New Synonyms

1. Navigate to the Administrator Panel and click on [Synonyms](#) on the tabs on the left.



2. Review existing synonyms to confirm you need to add the new one.

New Synonym			
Word	Synonym		
Background	History	Edit	Delete
Company	Corporation	Edit	Delete
company	firm	Edit	Delete
Firm	Company	Edit	Delete
Firm	Firma	Edit	Delete
Firm	Organization	Edit	Delete
History	Overview	Edit	Delete
Home	House	Edit	Delete
Location	site	Edit	Delete

3. Click [New Synonym](#).
4. Enter the first synonym in the [Word](#) field.
5. Enter the second and subsequent synonyms in the [Synonym](#) field.

A screenshot of the 'New Synonym' form. It has two text input fields: 'Word' and 'Synonym'. The 'Word' field contains the text 'client'. The 'Synonym' field contains the text 'customer'. Below the fields are two buttons: 'Save' and 'Cancel'. The entire form is enclosed in a blue border.

6. [Save](#).

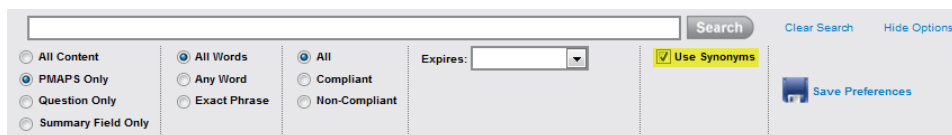
## Editing Synonyms

To edit an existing synonym:

1. Click the [Edit](#) button for the synonym you wish to edit.
2. Make your changes.
3. [Save](#).

## Searching with Synonyms

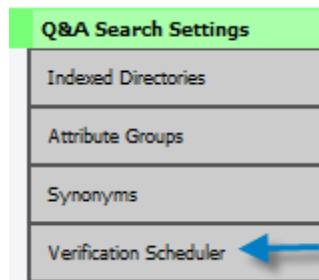
Be sure users are instructed to check the [Use Synonyms](#) box in the [Search Options](#) area of the Search screen.



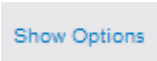
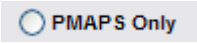
The screenshot shows the 'Search Options' section of the application. It includes a search bar, a 'Search' button, and several filter options. The 'Use Synonyms' checkbox is checked and highlighted in yellow. Other options include 'All Content', 'PMAPS Only', 'Question Only', 'Summary Field Only', 'All Words', 'Any Word', 'Exact Phrase', 'All', 'Compliant', and 'Non-Compliant'. There is also an 'Expires' dropdown menu and 'Clear Search' and 'Hide Options' links.

## Verification Scheduler

The [Verification Scheduler](#) allows you to schedule automatic export of your records, based upon any Saved Search you have created in the Search module.




To schedule a verification export:

1. Go to the [Search](#) module.
2. Click on [Search Options](#). 
3. Choose [PMAPS only](#). 
4. Filter the records to reflect the records you want to send out. For example, if you want all records for a specific Region/Line of Business, apply a filter for that attribute.
5. Select the Expires field and chose from those options (optional):



- Next Week
- Next Month
- Next Quarter
- Next Year
- Custom (displays a calendar so you may select a date)



6. Click the [Save Search](#)  icon to save your search.
7. Click on the [Administrator](#) menu.
8. Click on the [Verification Scheduler](#) menu.
9. Click [Schedule New Verification](#).
10. Enter a [Process Name](#).
11. Select your [Search Criteria](#) from your list of [Saved Searches](#) list.
12. Select the [Schedule](#).
13. [Save](#).
14. The [Next Scheduled Date](#) is automatically entered.

Verify Process Schedule	
Process Name:	<input type="text" value="US Records"/>
Search Criteria:	<input type="text" value="US"/> ▼
Schedule:	<input type="text" value="Beginning of Each Month"/> ▼
Next Scheduled Date:	<input type="text" value="8/1/2012"/>
<a href="#">Delete</a>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

The [Verification Scheduler](#) menu displays all created schedules.

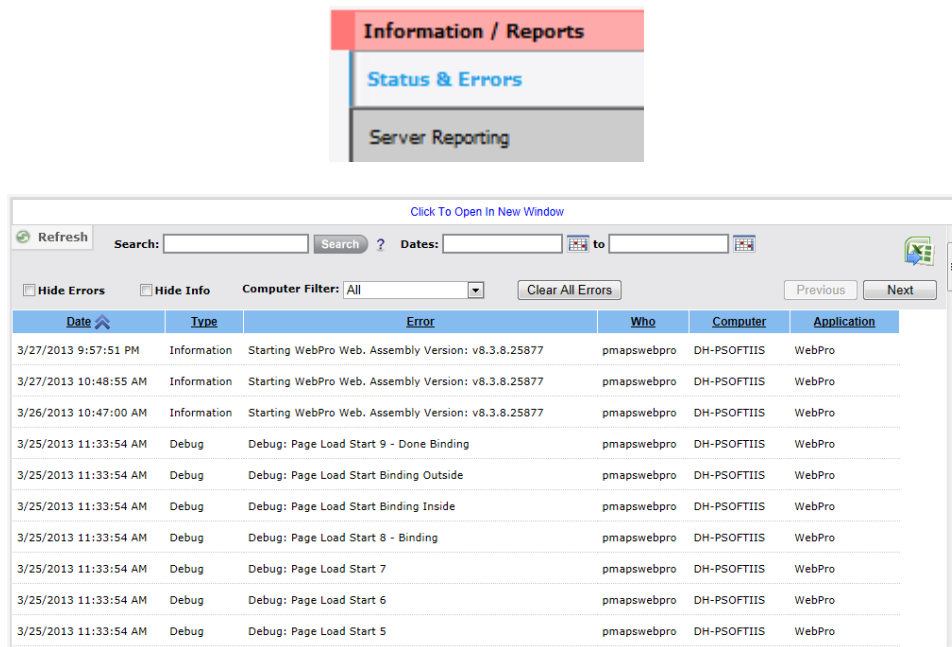
Schedule New Verification

Name	Schedule	Next Run	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Week 1	Week 2	Week 3	Week 4	Last Run
US Records	Beginning of Each Month	8/1/2012												

## Information/Reports

### Status & Errors

The [Status and Errors](#) menu shows a log of application activity and offers various viewing options including a search text bar, date range and basic filtering options. The Administrator can also [Clear All Errors](#) and [Refresh](#) the report. The report may also be exported to Excel.



The screenshot shows the 'Information / Reports' menu with 'Status & Errors' selected. Below it, the 'Status & Errors' report interface is displayed. It includes a 'Refresh' button, a search bar, a date range selector, and a 'Clear All Errors' button. The report table has columns for Date, Type, Error, Who, Computer, and Application.

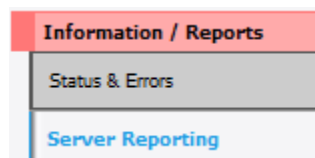
Date	Type	Error	Who	Computer	Application
3/27/2013 9:57:51 PM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/27/2013 10:48:55 AM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/26/2013 10:47:00 AM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 9 - Done Binding	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start Binding Outside	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start Binding Inside	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 8 - Binding	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 7	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 6	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 5	pmapswebpro	DH-PSOFTIIS	WebPro

#### ✓TIPS:

- ❖ If the Status and Errors screen takes a long time to load, it may be time to [Clear All Errors](#) and delete old data from the log.

### Server Reporting

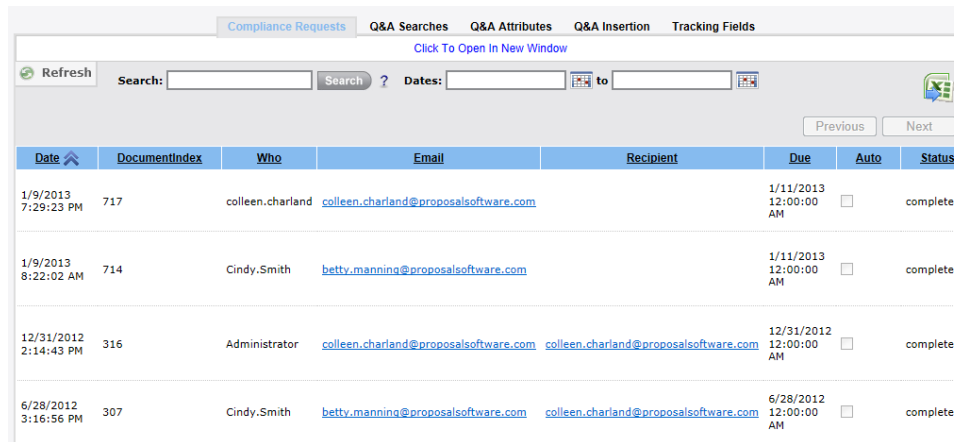
In [Server Reporting](#) you will find several reports that are generated automatically by PMAPS by users simply performing various functions in the WebPro application.



The screenshot shows the 'Information / Reports' menu with 'Server Reporting' selected. The 'Status & Errors' option is also visible.

## Compliance Request

The **Compliance Request** menu displays a history of all requests made through the Smart Cart. The screen displays the Date, User, and the Document Name.

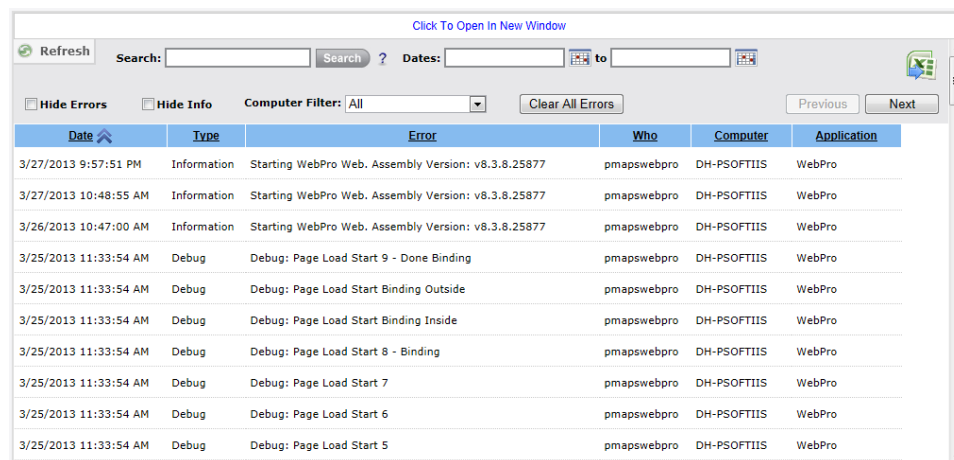


Date	DocumentIndex	Who	Email	Recipient	Due	Auto	Status
1/9/2013 7:29:23 PM	717	colleen.charland	<a href="mailto:colleen.charland@proposalssoftware.com">colleen.charland@proposalssoftware.com</a>		1/11/2013 12:00:00 AM	<input type="checkbox"/>	complete
1/9/2013 8:22:02 AM	714	Cindy.Smith	<a href="mailto:betty.manning@proposalssoftware.com">betty.manning@proposalssoftware.com</a>		1/11/2013 12:00:00 AM	<input type="checkbox"/>	complete
12/31/2012 2:14:43 PM	316	Administrator	<a href="mailto:colleen.charland@proposalssoftware.com">colleen.charland@proposalssoftware.com</a>	<a href="mailto:colleen.charland@proposalssoftware.com">colleen.charland@proposalssoftware.com</a>	12/31/2012 12:00:00 AM	<input type="checkbox"/>	complete
6/28/2012 3:16:56 PM	307	Cindy.Smith	<a href="mailto:betty.manning@proposalssoftware.com">betty.manning@proposalssoftware.com</a>	<a href="mailto:colleen.charland@proposalssoftware.com">colleen.charland@proposalssoftware.com</a>	6/28/2012 12:00:00 AM	<input type="checkbox"/>	complete

## Q&A Searches

To view a report of all searches performed by all users in the application:

1. Select the **Q&A Searches** menu. The screen displays the Date (and time), User name, number of Seconds to complete the search, and the Search Term entered by the user.
2. Clicking **Refresh** updates the screen with the most recent searches.
3. Clicking the **Previous** or **Next** buttons allow you to page through the report.



Date	Type	Error	Who	Computer	Application
3/27/2013 9:57:51 PM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/27/2013 10:48:55 AM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/26/2013 10:47:00 AM	Information	Starting WebPro Web. Assembly Version: v8.3.8.25877	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 9 - Done Binding	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start Binding Outside	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start Binding Inside	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 8 - Binding	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 7	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 6	pmapswebpro	DH-PSOFTIIS	WebPro
3/25/2013 11:33:54 AM	Debug	Debug: Page Load Start 5	pmapswebpro	DH-PSOFTIIS	WebPro

### ✓ TIPS


- ❖ New in Version 10, the Q&A Search report also contains number of records found and filter(s) applied to each search (if any).\*

## Q&A Attributes



This report displays changes made to the attributes in the [Search](#) module.


Compliance Requests   Q&A Searches   **Q&A Attributes**   Q&A Insertion   Tracking Fields

Click To Open In New Window

 Refresh

Search:   ?

Dates:   to  


Date 	Who	Email	DocumentIndex	Field	OriginalValue
3/25/2013 11:26:16 AM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	1156	Summary Information	
3/25/2013 11:25:38 AM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	319	Sub Topic	
3/25/2013 11:25:38 AM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	319	SME	Karen Epps
<div>Search Module The Search module allows you to access content you have stored or indexed in PMAPS for purposes of completing client proposals, consultant database updates, internal requests for information, etc. If this is your first time searching, you may want to take a few minutes to familiarize yourself with your search</div>					

## Q&A Insertion



To view a report of all Q&As that have been inserted, click the [Q&A Insertion](#) tab. When users are working in the cloud the proposal name will automatically be tracked in addition to the date, document ID, method of insertion, and user who inserted.


Compliance Requests   Q&A Searches   Q&A Attributes   **Q&A Insertion**   Tracking Fields


Click To Open In New Window

 Refresh

Search:   ?

Dates:   to  



Date 	Proposal	DocumentIndex	Relink	Method	Who	Email
3/18/2013 2:18:53 PM		1152	<input type="checkbox"/>	Full	colleen.charland	<a href="mailto:colleen.charland@proposalsoftware.com">colleen.charland@proposalsoftware.com</a>
12/5/2012 5:41:00 PM	Defined Public Benefit client	319	<input type="checkbox"/>	Full	Administrator	<a href="mailto:colleen.charland@proposalsoftware.com">colleen.charland@proposalsoftware.com</a>
11/9/2012 9:25:53 AM		296	<input type="checkbox"/>	Full	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>
11/9/2012 8:43:40 AM		297	<input type="checkbox"/>	Full	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>
9/30/2012 8:31:51 PM	ABC Company Excel Cindy Smith	319	<input type="checkbox"/>	Full	Administrator	<a href="mailto:colleen.charland@proposalsoftware.com">colleen.charland@proposalsoftware.com</a>
9/30/2012 8:25:57 PM	ABC Company Excel Cindy Smith	319	<input type="checkbox"/>	Full	Administrator	<a href="mailto:colleen.charland@proposalsoftware.com">colleen.charland@proposalsoftware.com</a>
8/16/2012 4:21:15 PM	ABC Excel	319	<input type="checkbox"/>	Full	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>
7/29/2012 3:23:58 PM	Acme Proposal Seat 1	181	<input type="checkbox"/>	Full	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>
7/29/2012 3:22:09 PM	Acme Proposal Seat 1	181	<input type="checkbox"/>	Full	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>

## Tracking Fields

Similar to the Q&A Attributes report, the [Tracking Fields](#) report displays information about any changes made to the tracking attributes on the [Dashboard](#).

Compliance Requests   Q&A Searches   Q&A Attributes   Q&A Insertion <b>Tracking Fields</b>					
Click To Open In New Window					
Refresh	Search:	Search ?	Dates:	to	
Previous Next					
Date	Who	Email	Proposal	Field	OriginalValue
3/21/2013 12:53:55 PM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Admin Manual - DO NOT DELETE	Started On	2/8/2013 12:58:38 AM
3/21/2013 12:53:55 PM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Admin Manual - DO NOT DELETE	Proposal Title	Copy of User Manual - DO NOT DELETE
11/9/2012 11:26:29 AM	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Corporation RFP UC	Proposal Title	Acme Corporation RFP 2 UC
11/9/2012 11:25:42 AM	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Corporation RFP UC	Proposal Title	Copy of Acme Corporation RFP UC
11/8/2012 6:06:45 PM	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Assignment RFP	Bid Manager	Cindy Smith
11/8/2012 6:06:45 PM	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Assignment RFP	Date Received	7/20/2012 12:00:00 AM
11/8/2012 6:06:45 PM	betty.manning	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Assignment RFP	Date Search Declined	7/17/2012 12:00:00 AM
11/4/2012 11:21:00 AM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme Assignment RFP	Date Shipped	
11/4/2012 11:20:38 AM	Cindy.Smith	<a href="mailto:betty.manning@proposalsoftware.com">betty.manning@proposalsoftware.com</a>	Acme RFP Aug 2012	Competition	

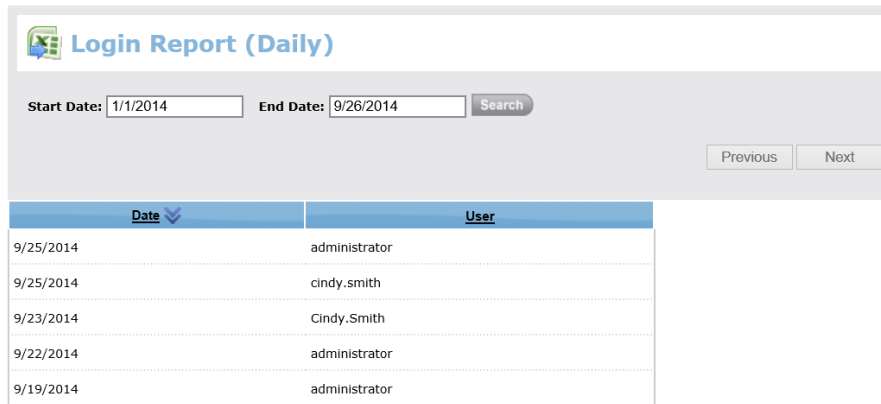
## Login Report (All)

This report displays every log in by user with a date and time stamp

Login Report (All)	
Start Date: 1/1/2014	End Date: 9/26/2014 Search
Previous Next	
Date	User
9/25/2014 12:19:58 PM	cindy.smith
9/25/2014 12:19:08 PM	administrator
9/25/2014 5:32:01 AM	administrator
9/25/2014 3:40:45 AM	administrator

## Login Report (Daily)

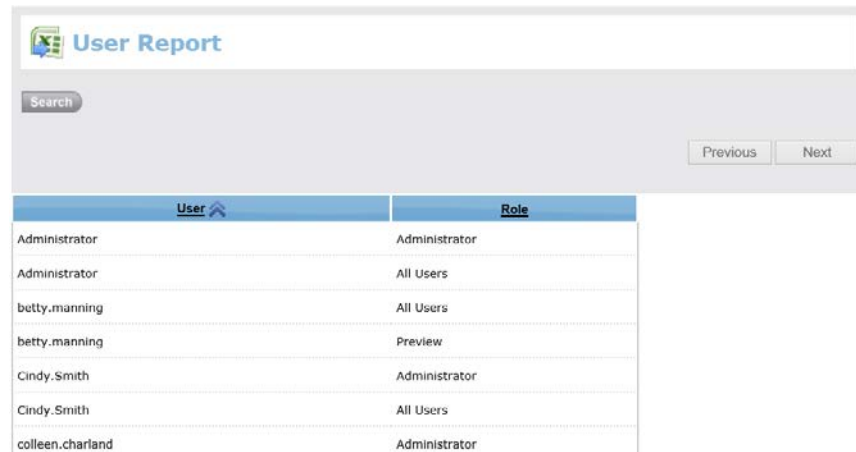
This report displays every log in by user name



Date	User
9/25/2014	administrator
9/25/2014	cindy.smith
9/23/2014	Cindy.Smith
9/22/2014	administrator
9/19/2014	administrator

## User Report

This report shows every user in the system by role (Group)



User	Role
Administrator	Administrator
Administrator	All Users
betty.manning	All Users
betty.manning	Preview
Cindy.Smith	Administrator
Cindy.Smith	All Users
colleen.charland	Administrator

## Other Settings

### Word Replacements

This tool allows you to have an unlimited number of codes, which are automatically replaced with text upon insertion, in your documents. This tool is particularly useful for numbers or text that changes often and is shown in multiple records in your database.

For example, the code PSI is automatically replaced with the Client's name entered on the [Summary](#) menu in the [Tracking](#) module for the current proposal.

<a href="#">Add New</a>			
Keyword	Replacement		
<<ZIP>>	Proposal Tracking Field: Zip	<a href="#">Edit</a>	<a href="#">Delete</a>
<<City>>	Proposal Tracking Field: City	<a href="#">Edit</a>	<a href="#">Delete</a>
Contact First Name	Proposal Tracking Field: Contact First Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<State>>	Proposal Tracking Field: State	<a href="#">Edit</a>	<a href="#">Delete</a>
<<AUM>>	\$10 million	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Customer Name>>	Proposal Tracking Field: Client Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Address1>>	Proposal Tracking Field: Address1	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Client Name>>	Proposal Tracking Field: Client Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<numofees>>	1300	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Contact Full Name>>	Proposal Tracking Field: Contact	<a href="#">Edit</a>	<a href="#">Delete</a>

To add a code:

1. Click [Add New](#). The following screen will appear.

<a href="#">Add New</a>			
Keyword	Replacement		
<<ZIP>>	Proposal Tracking Field: Zip	<a href="#">Edit</a>	<a href="#">Delete</a>
<<City>>	Proposal Tracking Field: City	<a href="#">Edit</a>	<a href="#">Delete</a>
Contact First Name	Proposal Tracking Field: Contact First Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<State>>	Proposal Tracking Field: State	<a href="#">Edit</a>	<a href="#">Delete</a>
<<AUM>>	\$10 million	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Customer Name>>	Proposal Tracking Field: Client Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Address1>>	Proposal Tracking Field: Address1	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Client Name>>	Proposal Tracking Field: Client Name	<a href="#">Edit</a>	<a href="#">Delete</a>
<<numofees>>	1300	<a href="#">Edit</a>	<a href="#">Delete</a>
<<Contact Full Name>>	Proposal Tracking Field: Contact	<a href="#">Edit</a>	<a href="#">Delete</a>

2. Enter the [Replacement Keyword](#) surrounded by <<word>> arrow symbols.
3. Select [Use Exact Text](#) or [Use Mapped Field](#) (from PMAPS).
4. Enter the [Replacement Text](#) or select a [PMAPS mapped field](#).
5. Click [OK](#).

## Email Settings

From the Email Settings screen, Administrators may globally customize the subject/message for outbound emails. There are two outbound emails available to configure.

- [Configure Compliance Email](#) - This is the message your SME's receive along with records from PMAPS.
- [Configure Assembly Email](#) – This is the message sent with documents sent to SMEs from the Assembly Center.

1. Click on the [Administration](#) icon on the [Navigation](#) bar at the top of the screen.
2. Click on the [Email Settings](#) menu.
3. Select the email you wish to customize by clicking on the appropriate icon. You may customize the Subject line as well as the Body of the email.

**Configure Compliance Email** [Configure Assembly Email](#)

**Compliance Request Email Message Template**

Subject:

Body: 

```
<br /><b>Automated Message from WebPro</b><br /><br />The
attached document is being sent to you for review. Please
verify the document and return it to: <<REQUESTOR>>: <a
href="mailto:<<REQUESTOREMAIL>>"><<REQUESTOREMAIL>></a>.<br
/><br />Due date: <<DUEDATE>>.
```

<<REQUESTOR>>: Requestor's Name  
<<REQUESTOREMAIL>>: Requestor's Email  
<<DUEDATE>>: Due Date

4. At any time during the update process, click the Preview button on the bottom of the screen to see the updates.

## SALESDOC BUILDER MODULE

### Overview

The [SalesDoc Builder™](#) is a sales proposal (vs. RFP/RFI) tool where sales proposals can be completed by sales people using a Wizard. The creation of sales forms by the administrator requires no programming and a special [Word Replacement](#) feature allows [Dashboard](#) (Tracking) field information to be merged into the proposals.

The creation of SalesDocs by the administrator is a simple, five-step process.

1. Getting Started: Decide what content will be inserted into the proposal.
2. Creating the Form: Name the form and underlying data table.
3. Add Categories: Add [Categories](#) or sections to the proposal.
4. Add Questions: Add questions or statements to the sections.



5. Add Documents: Add the documents to be inserted from PMAPS in response to each question along with the applicable rules.

## Getting Started

Before you start building your form with the SalesDoc Builder module, spend a few minutes organizing your materials and planning your form:

1. Identify the content that will be inserted in your documents as PMAPS records or indexed content.
2. Decide what [Categories](#) to include in your form.
3. Decide what questions to include in your form and their order.
4. Write down the documents you want to insert at each insertion point (Documents).

## Creating a Basic Form

### General Tab

1. Click the [SalesDocs](#) icon in the [Navigation](#) bar.



2. Click the [New Form](#) icon.



3. Enter the [Form Name](#): Standard RFP-Product 1
4. Enter the [Database Table Name](#): StandardRFPProd1
5. Select the [Document Type](#): Word Document or Power Point Document

6. Check the [Group Permissions](#) boxes to show this SalesDoc form to the users who need to access it in the SalesDoc Wizard in the Tracking module.

7. Click [Save](#). A save confirmation is displayed with the date and time the was last updated.

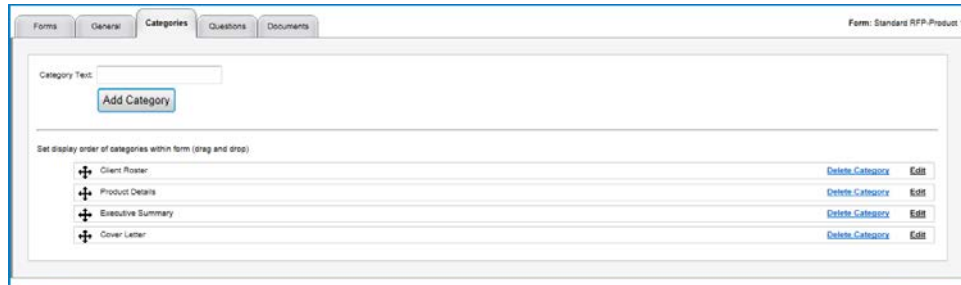
Form updated 7/8/2012 5:28:55 PM

## Categories Tab

You may set up as many categories as you like. The categories simply allow you to organize the form into sections to make it easier for the end user to fill out. To add categories:

1. Enter a name for your first category in the [Category Text](#) field (e.g., Cover Letter or Section 1: Introductory Materials)

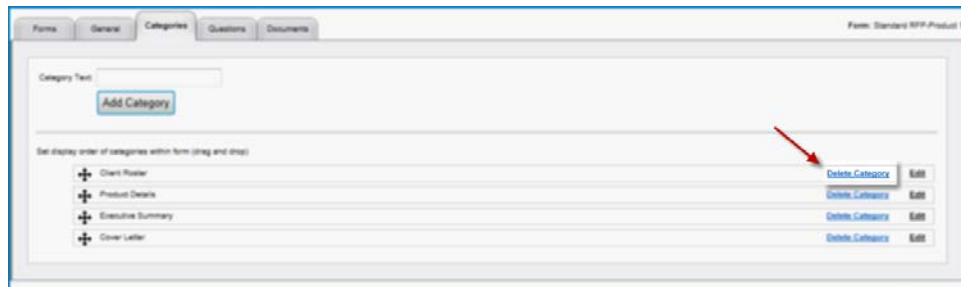
2. Click [Add Category](#).
3. The new category name is displayed in the lower part of the screen under [Set display order of categories within form \(drag and drop\)](#). You have three category options:




- a. You may reorder the categories by clicking and dragging the move icon.



- b. You may remove a category by clicking the [Delete Category](#) icon.



- c. Click the [Edit](#) icon to edit the category name.



4. Repeat Steps 1-2 to add additional [Categories](#).

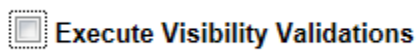
- Now that you have your [Categories](#) set up, click on the [Questions Tab](#) to add the form components.

## Questions Tab



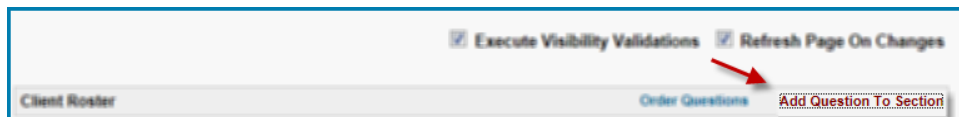
The screenshot shows the 'Questions' tab in a software interface. At the top, there are tabs for 'Forms', 'General', 'Categories', 'Questions', and 'Documents'. The 'Questions' tab is active. Below the tabs, there are two checkboxes: 'Execute Visibility Validations' and 'Refresh Page On Changes', both of which are checked. Below these checkboxes, there is a table with four rows, each representing a form section: 'Client Roster', 'Product Details', 'Executive Summary', and 'Cover Letter'. Each row has two buttons: 'Order Questions' and 'Add Question To Section'.

- When you are creating a form, it is advisable to uncheck the [Execute Visibility Validations](#) so you can see all of the parts of your form—even those which only appear when a condition is met.



## Add Question to Section

- In this section you will begin in the [Questions Tab](#). Click [Add Question To Section](#) to add your first item. It does not have to be a question per se, but rather a prompt for action that results in something being inserted or some other text being displayed.



The screenshot shows the 'Questions' tab interface. At the top, there are tabs for 'Forms', 'General', 'Categories', 'Questions', and 'Documents'. The 'Questions' tab is active. Below the tabs, there are two checkboxes: 'Execute Visibility Validations' and 'Refresh Page On Changes', both of which are checked. Below these checkboxes, there is a table with one row, representing a form section: 'Client Roster'. Each row has two buttons: 'Order Questions' and 'Add Question To Section'. A red arrow points to the 'Add Question To Section' button.

## General Information

The [General Information](#) tab is displayed. Detailed information about each question or item in your form is captured on this tab. There are 8 sections on this tab—numbered a-h below. Some of the sections are mandatory and some are purely informational and control the form display in the area surrounding your item.

General Information

Form Category: Cover Letter

Database Column to Save to: IncludeCovLet

Question Type: Drop Down Menu (String)

Width: 200

Question Text: Include cover letter?

Display Sections: enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"

Default Value: (This will be the value filled in on form load (Careful To Match Value Type))

Value Label: (displayed after the control used for things like 'ft', 'miles' or '%\$ etc. )

save

8. Fill out the General Information tab as follows:

- Select the **Form Category**, which is a drop-down list containing all the categories you created on the **Categories** tab. This step is mandatory.

a Form Category: Cover Letter

- Enter a name for the database to store the topic of this question in your sql table. This step is mandatory and the name cannot contain any spaces, underlines, hyphens or symbols.

In this example, the first section pertains to the inclusion of a cover letter, so the database name is IncludeCovLet.

b Database Column to Save to: IncludeCovLet

- Select the **Question Type**:

c Question Type: Drop Down Menu (String)


#### ✓TIPS

- ❖ Please refer to the [Question Type Options](#) section of this document for a complete list of options along with examples.


- ❖ If **String Max Length in DB** is displayed, enter a value. This field is only shown if the question type requires that it be filled out.

String Max Length in DB:


- d. Enter the **Width** of the column. This is not mandatory and will only be displayed if it is an option for the question type you chose in Step 8 c. The system will use the default if you do not enter a width.


 Width:


- e. Enter the **Question Text**: It is not mandatory that you use a question format. It can be a statement or a word or phrase.


 Question Text:

- f-h. Enter values if applicable for the **Display Sections**:, **Default Value**:, and **Value Label**:. Review the notes displayed with each field to determine if you want to include that information.

 Display Sections:   
 enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"

 Default Value:  (This will be the value filled in on form load (Careful To Match Value Type!)

 Value Label:  ( displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )

- i. Click **Save**.  A confirmation displays indicating that the question has been saved.

Question Saved 7/9/2012 4:56:42 PM

Additional tabs and options are displayed according to the type of question you chose in Step 8c.

In addition to the **General Information** tab, the **Options** and **Advanced Options** tabs are available.

**General Information** Options Advanced Options

## Question Definition

Also, the page you were just working on is now displayed as [Question Definition](#). There are two additional links for [Help Text](#) and [Possible Answers](#).

Question Definition   Help Text   Possible Answers

Question Saved 7/9/2012 4:56:42 PM

Form Category: Cover Letter

Database Column to Save to: includeCover

Question Type: Drop Down Menu (String)

Width: 200

Question Text: Include cover letter?

Display Sections: enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation,Sunday"

Default Value: (This will be the value filled in on form load (Careful To Match Value Type))

Value Label: (displayed after the control used for things like "ft", "miles" or "%.S etc. ")

Save

## Possible Answers

9. Enter all possible answers or choices for your first question from Step 8.
  - a. With the [General Information](#) tab selected, click on [Possible Answers](#).



- b. Enter a value into the [Answer](#) field.

**b** Answer:

- c. Enter a Default Value if desired.

**c** Value:  The answer will be used as the value if left blank

- d. Click [Save](#).

**d** Save

- e. The answer appears in the area at the bottom of the screen.

boolean checkbox first answer  
boolean dropdown the first

Answer: Yes Value: Yes

Answer: No Value: No

- f. You may reorder the answers by clicking on the move icon, moving the answer to the new position, and pressing the space bar on your keyboard to anchor the position



- g. Click the Delete option to remove an answer from the list.



- h. Repeat Steps 9a-d to add all possible answers.

General Information Options Advanced Options

Question Definition Help Possible Answers

No Added 7/9/2012 5:13:09 PM

Answer:

Value:  The answer will be used as the value if left blank

Save

Or copy from another question

Form: Standard RFP-Product 1

Form Section: Cover Letter

Question: Include cover letter? - IncludeCo

Copy Answers

Set display order of possible answer for the question(drag and drop)  
For boolean checkbox first answer is used as text  
For boolean dropdown the first answer is "False" and second is "True" They will display differently in drop down though

Answer: Yes Value: Yes

Answer: No Value: No

delete

delete



Return to the [Questions](#) tab to view your progress.

The screenshot shows the 'Questions' tab in the PMAPS WebPro Administrator interface. The interface has a top navigation bar with tabs: Forms, General, Categories, Questions (selected), and Documents. The main content area is titled 'Form: Standard RFP-Product 1'. It contains a list of sections: Cover Letter, Executive Summary, Product Details, and Client Roster. Each section has a dropdown menu for 'Include [section name]?' and an 'edit' button. The 'Cover Letter' dropdown is open, showing options: Please Select, Yes, and No. The 'Executive Summary' dropdown is also open, showing options: Please Select, Yes, and No. The 'Product Details' and 'Client Roster' dropdowns are closed. There are also 'Order Questions' and 'Add Question To Section' buttons for each section.

10. Repeat Steps 6-9 to add all questions or items to your form.

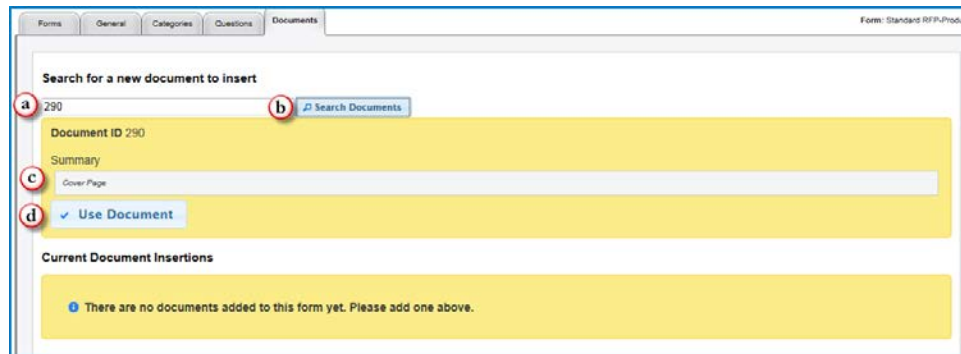
The screenshot shows the 'Questions' tab in the PMAPS WebPro Administrator interface. The interface has a top navigation bar with tabs: Forms, General, Categories, Questions (selected), and Documents. The main content area is titled 'Form: Standard RFP-Product 1'. It contains a list of sections: Cover Letter, Executive Summary, Product Details, and Client Roster. Each section has a dropdown menu for 'Include [section name]?' and an 'edit' button. The 'Cover Letter' dropdown is open, showing options: Please Select, Kevin Berardino, Leslie Hatcher, Wendy Cheng-Wong, John Laurino, Cameron Fenley, and Helen Tordie. The 'Executive Summary' dropdown is also open, showing options: Please Select, Yes, and No. The 'Product Details' dropdown is closed. The 'Client Roster' dropdown is open, showing options: Please Select, Yes, and No. There are also 'Order Questions' and 'Add Question To Section' buttons for each section.

## Documents Tab

11. Click the [Documents](#) tab to program which files to insert upon user selection of form fields on the Questions tab.

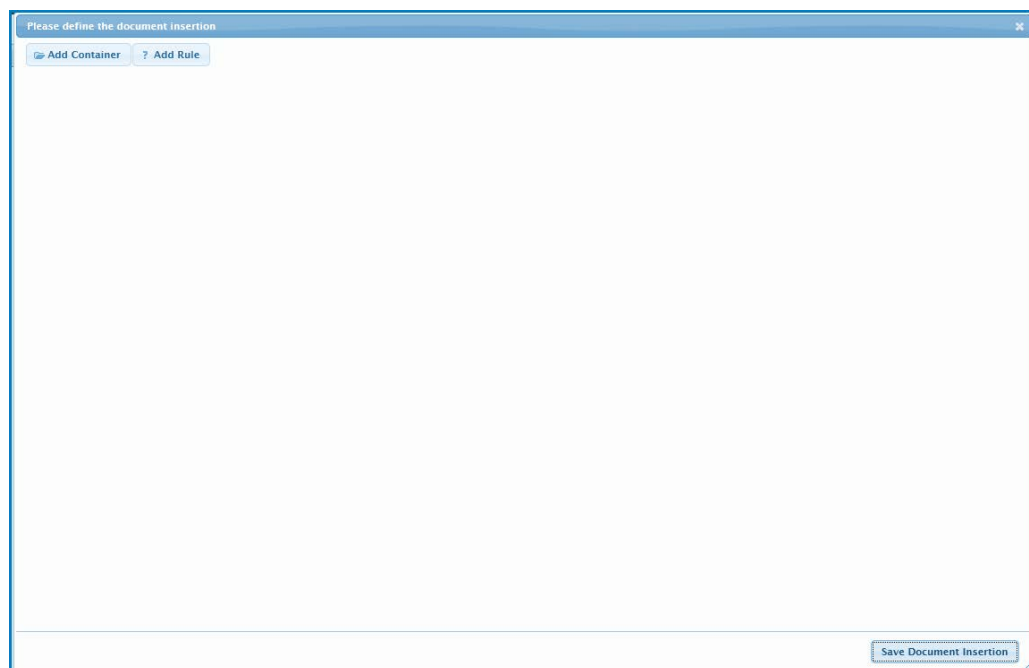
The screenshot shows the 'Documents' tab in the PMAPS WebPro Administrator interface. The interface has a top navigation bar with tabs: Forms, General, Categories, Questions, and Documents (selected). The main content area is titled 'Form: Standard RFP-Product 1'. It contains a search bar with the text 'Search for a new document to insert' and a 'Search Documents' button. Below the search bar is a section titled 'Current Document Insertions'. A yellow message box states: 'There are no documents added to this form yet. Please add one above.'

If you have already listed the files to be inserted, as recommended in the Overview for this module, this process goes very quickly. If you haven't, you may open the Search module in a separate tab and toggle back and forth from [Search](#) to [SalesDocs](#).



To link your documents:

- Search for a new document to insert by entering the Doc ID. This can be a Q&A, (indexed) doc. or docx. file for a Word SalesDoc. Or a indexed PPT file for the PPT Sales Doc. File types cannot be mixed within one SalesDoc.
- Click [Search Documents](#).
- The text in the summary field of the record appears on the screen. Confirm that it is the correct document.
- Click [Use Document](#). The [Please define the document insertions screen](#) is displayed.



- e. If this document is always inserted, click [Save Document Insertion](#). In our example, the item is a cover page that is always inserted. Therefore, we do not need to add a rule.

OR

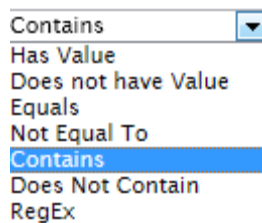
- e. If a Rule for the insertion needs to be created, click on the drop-down list to view a list of questions and select the pertinent question.



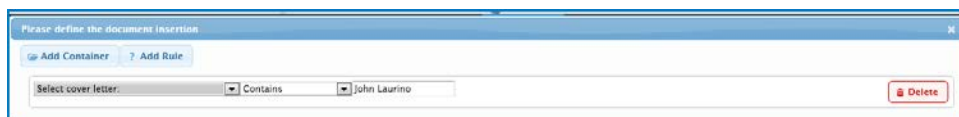
- f. For the second item, the form field is radio buttons. There are 6 options for cover letters. Therefore, we need to create a rule:
- g. Click on the drop-down list to choose from the list of form insertion options: [Select cover letter](#).



- h. Select the operator: Contains



- i. Enter the condition, which would be one of the Possible Answers for this question. In this example, we are using John Laurino.



- j. Click [Save Document Insertion](#)
- k. Once returned to the Documents tab, select the pagination option for this item.

Document: 290	Break Option:	Section Break NextPage	Cover Page	Edit	Change Doc	Copy	Delete
Document: 292	Break Option:	Paragraph	Cover Letter - Kevin Berardino	Edit	Change Doc	Copy	Delete
		Page Break					
		Section Break Continuous					
Document: 293	Break Option:	Section Break NextPage	Cover Letter - Wendy Cheng-Wong	Edit	Change Doc	Copy	Delete
		None					

## ✓TIPS

- ❖ You may have as many rules as you require, with many if, then, else statements.

12. Refer to the User Manual section covering SalesDoc Wizard for instructions on generating proposals from forms.

## Question Type Options

There are six options for question types/form fields that are functional at this time. (There are also 6 types of Text fields that will be available in future releases. See the end of this section for a list of the text fields)

Following are graphical examples of how to fill out the Question Setup for each option and then the Form Display example of what that would look like on the actual form.

Drop Down Menu (String)  
 Drop Down Menu (Integer)  
 Drop Down Menu (Boolean) 'yes/no'  
 Check Box (Boolean)  
 Check Box List (String[]) will be '|' delimited in DB  
 Radio List (String)

### ■ Drop Down Menu (String) Question Setup

The screenshot shows the 'Question Setup' form for a 'Drop Down Menu (String)'. The form includes the following fields and options:

- Form Category:** A dropdown menu set to 'Question Examples'.
- Database Column to Save to:** A text field containing 'DDMString'.
- Question Type:** A dropdown menu set to 'Drop Down Menu (String)'.
- Width:** A text field containing '200'.
- Question Text:** A text area containing 'Sample Drop Down Menu (String)'.
- Display Sections:** A text field with a placeholder instruction: 'enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"'.
- Default Value:** A text field with a placeholder instruction: '(This will be the value filled in on form load (Careful To Match Value Type))'.
- Value Label:** A text field with a placeholder instruction: '( displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )'.
- save** button.

### ■ Drop Down Menu (String) Form Display

The screenshot shows the 'Form Display' for a 'Drop Down Menu (String)'. It features a dropdown menu with the following options:

- Please Select
- Please Select
- Selection 1
- Selection 2
- Selection 3
- Selection 4

The form also includes a label 'Sample Drop Down Menu (String)' and an 'edit' button.

- Drop Down Menu (Integer) Question Setup

Question Saved 12/13/2009 6:41:07 PM

Form Category:

Database Column to Save to:

Question Type:

Width:

Question Text:

Display Sections:

Default Value:  (This will be the value filled in on form load (Careful To Match Value Type!))

Value Label:  (displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )

- Drop Down Menu (Integer) Form Display

Sample Drop Down Menu (Integer)

1  
2  
3  
4  
5

- Drop Down Menu (Boolean) 'yes/no' Question Setup

Form Category:

Database Column to Save to:

Question Type:

Width:

Question Text:

Display Sections:

Default Value:  (This will be the value filled in on form load (Careful To Match Value Type!))

Value Label:  (displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )

- Drop Down Menu (Boolean) 'yes/no' Form Display

Sample Drop Down Menu (Boolean) 'yes/no'

Yes  
No

- Check Box (Boolean) Question Setup

Please refer to the Notes area of the screen when using the Drop-down Menu Boolean option:

Set display order of possible answer for the question(drag and drop)  
 For boolean checkbox first answer is used as text  
 For boolean dropdown the first answer is "False" and second is "True" They will display differently in drop down though

+ Answer: CEO Biography Value: CEO Biography [delete](#)

- Check Box (Boolean) Form Display

Sample Check Box (Boolean) ☒ CEO Biography [edit](#)

- Check Box List (String) Delimited Question Setup

Form Category:

Database Column to Save to:

Question Type:

Number of Columns:

Width:

Question Text:

Display Sections:   
 enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"

Default Value:  (This will be the value filled in on form load (Careful To Match Value Type!))

Value Label:  ( displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )

[save](#)

- Check Box List (String) Delimited Form Display

Sample Check Box List (String) Delimited

☐ 1-50 ☐ 101-150

☐ 51-100 ☐ 151-200

- Do not need to add Yes/No as possible Answers. Just go to Insertion area and indicate contains text Yes, Doc ID.

- Check Box List (String) Delimited-2 columns—can select one or more—insertion with each option.

The screenshot shows the configuration window for a 'Radio List (String)' question. The 'Form Category' is set to 'Question Examples'. The 'Database Column to Save to' is 'RLString'. The 'Question Type' is 'Radio List (String)'. The 'Number of Columns' is 5 and the 'Width' is 200. The 'Question Text' field contains 'Sample Radio List (String)'. The 'Display Sections' field has a placeholder text: 'enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"'. The 'Default Value' field is empty, with a note: '(This will be the value filled in on form load (Careful To Match Value Type))'. The 'Value Label' field is empty, with a note: '( displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )'. A 'save' button is at the bottom.

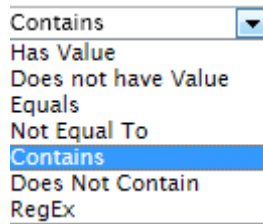
- Radio List (String)—can only select one.

The screenshot shows a 'Radio List(String)' control with four radio button options: '1-50', '101-150', '151-200', and '51-100'. The '1-50' option is selected.

As mentioned in the overview of this section, the text box options have no functionality right now in WebPro. They are being developed and will be offered in a future release. The Text Box options will be:

- Text Box (String)
- Text Box (Integer)
- Text Box (Decimal)
- Text Box (Currency)
- Text Box (Date)
- Multiline Text Box (String)

## Form Insertion Options



- **Has Value:** There is something entered in the field.
- **Does not have Value:** The field is empty.
- **Equals:** The value entered into the field must match the value defined by the user.
- **Contains:** The value entered must match part but not necessarily all of the defined value.
- **Does Not Contain:** The value entered must not contain the defined value, but it must contain a value.
- **RegEx:** The value entered is a regular expression.

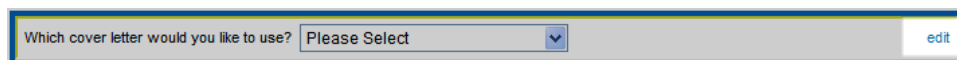
## Adding More Advanced Features

Following are instructions for additional options to improve the functionality and complexity of your forms.

### Help Text

The **Help Text** area allows you to enter information to assist the user in answering the question. There are many formatting options. To apply Help Text to a question:

1. Click on the questions tab on your form.
2. Select the question you want to add **Help Text** for.
3. Click **Edit**.

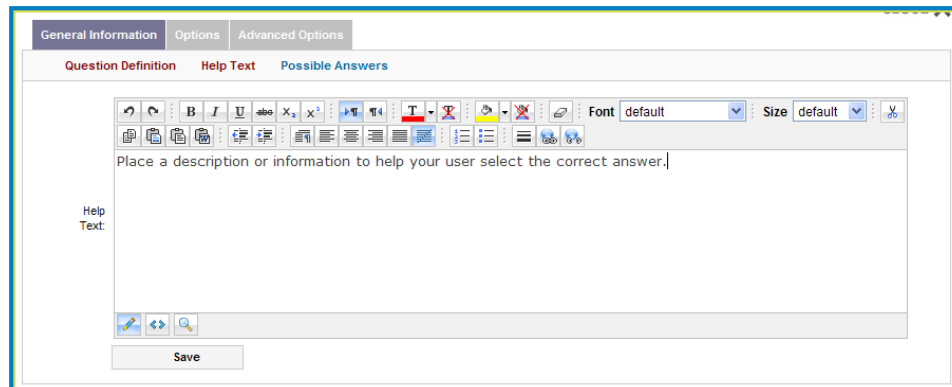


The General Information tab is automatically selected:

4. Click the **Help Text** button above the formatting toolbars. The Help Text page is displayed.



5. Enter and format any text you'd like to include for the current question you are adding.

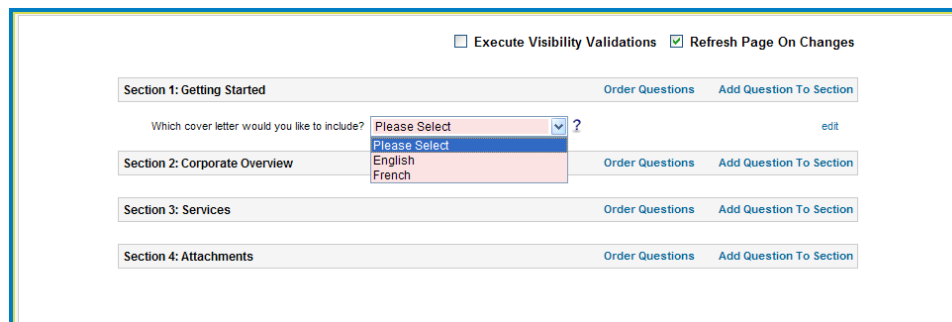


6. Click [Save](#).

## Validations and Warnings

This option allows you to set a validation or create a warning. For example, if a response or action is required. A validation check for something and a correction must be made to continue. A warning alerts you to something, but you may continue. To use this feature:

1. Make sure you are on the Questions tab of your form.



2. Select the question to add the validation to.
3. Click [Edit](#).



4. Hover over [Options](#) to see the options:
  - Validations and Warnings

- Insert Document

General Information	Options	Advanced Options
Validations & Warnings		Insert Document

5. Click [Validations and Warnings](#).

6. Click [Add Validation or Warning](#)



7. Click the radio button to choose [Validation](#). Radio buttons only allow one choice.
8. Select the [Type: Required](#)
9. In the [Enter Error/Warning Tool Tip Display Text](#) field, enter a statement; e.g., [A Cover Letter is required](#).
10. Click [Save](#).

## Visibility

Another option is to have additional information displayed on your form once a condition is met. For example, you could ask a Yes or No question. If the answer is Yes, another question or group of questions is displayed. If the answer is No, nothing happens.

The screenshot shows a 'Question Definition' form with the following fields and options:

- Form Category:** Cover Letter (dropdown)
- Database Column to Save to:** IncludeCovLet (text input)
- Question Type:** Drop Down Menu (String) (dropdown)
- Width:** 200 (text input)
- Question Text:** Include cover letter? (text area)
- Display Sections:** enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday" (text input)
- Default Value:** (text input) (This will be the value filled in on form load (Careful To Match Value Type!))
- Value Label:** (text input) (displayed after the control used for things like 'ft', 'miles' or %, \$ etc. )
- Buttons:** save, CLOSE

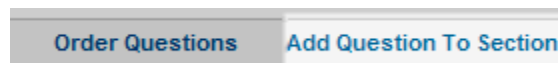
1. Add the yes/no question; e.g., Include cover letter?
2. You may choose the [Drop Down Menu \(Boolean\)](#) 'yes/no' Question Type, or you may choose the drop down menu and just add answers for yes or no. If you choose the Boolean option, you do not need to add the Yes and No as possible answers. The system automatically knows the possible answers are Yes and No..
3. Click [Save](#).

4. Create the question that you want to appear if the answer to the question is yes; e.g. Choose cover letter.

The screenshot shows the 'Question Definition' tab of a form editor. It includes fields for 'Form Category' (set to 'Cover Letter'), 'Database Column to Save to' (set to 'SelectedCovLet'), 'Question Type' (set to 'Radio List (String)'), 'Number of Columns' (set to 2), and 'Width' (set to 200). The 'Question Text' field contains 'Select cover letter:'. Below this is a 'Display Sections' field with a placeholder text: 'enter them semi colon delimited. Each section will indent the section. enter them like "Hours of operation;Sunday"'. There are also fields for 'Default Value' and 'Value Label', both with placeholder text. A 'save' button is at the bottom.

5. Make sure you are on the Questions tab of your form.

6. Click [Add Question to Section](#)



#### ✓TIPS

- ❖ Use the Order Questions button to reorder the questions on your form whenever necessary.

7. Click [Possible Answers](#) to add a list of cover letters.
8. With the [General Information](#) tab selected, click on [Possible Answers](#).
9. Enter a value into the [Answer](#) field.
10. Click [Save](#).

11. Repeat Steps 8-10 to add all possible answers.

The screenshot shows the 'Possible Answers' tab within a configuration window. At the top, there are tabs for 'General Information', 'Options', and 'Advanced Options'. Below these are sub-tabs: 'Question Definition', 'Help Text', and 'Possible Answers'. The 'Possible Answers' sub-tab is active. It contains a form with 'Answer:' and 'Value:' input fields, a 'Save' button, and a section titled 'Or copy from another question' with dropdowns for 'Form' (Standard RFP-Product 1), 'Form Section' (Cover Letter), and 'Question' (Include cover letter? - IncludeCo), along with a 'Copy Answers' button. Below this is a section for setting the display order of possible answers, with instructions for boolean checkboxes and dropdowns. A list of existing answers is shown, each with a plus icon, the answer text, the value, and a delete button. The answers listed are: Kevin Berardino, Wendy Cheng-Wong, Cameron Fenley, Leslie Hatcher, John Laurino, and Helen Torbe.

12. Click [Options](#).

13. Click on [Validations and Warnings](#).

14. Select the [Validation](#) option.

15. Select Visibility from the [Type](#) menu. Additional fields are now required.

The screenshot shows the 'Validations & Warnings' tab within the same configuration window. It has tabs for 'General Information', 'Options', and 'Advanced Options'. The 'Validations & Warnings' tab is active. It contains a section for 'Warning Or Validation' with radio buttons for 'Validation' (selected) and 'Warning'. Below this is a 'Type' dropdown menu set to 'Visibility (requires advanced settings)'. There are three more dropdown menus: 'Question To Check' (set to 'Include cover letter?'), 'Regular Expression' (set to 'Custom (Matches Exactly (Case)'), and 'Custom Expression' (set to 'Yes'). A 'Save' button is at the bottom.

16. Select the [Question to Check](#): Would you like to include an executive summary?

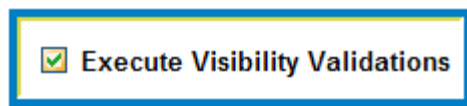
17. Choose a [Regular Expression](#) from the list: Exactly Matches
18. Enter the Custom Expression: True. A note about Yes/No, True/False: In Boolean logic, Yes means True. So, even though the user is choosing yes, the program reads that choice as True.
19. Click [Save](#).
20. Click [Close](#) to return to the main form screen.

CLOSE X

21. Apply insertion Rules for each document to insert if it is chosen, just like we did for John Laurino in Step. 11 of the [Documents Tab](#) section.

To see how this works on your form:

1. On the Questions tab of your form, check [Execute Visibility Validations](#).



2. Locate and review the area of the form where your first question, 'Include cover letter' appears on the form. Notice what follows that question on your form.

☒ Execute Visibility Validations   ☒ Refresh Page On Changes

Cover Letter
Order Questions   Add Question To Section

Include cover letter?

Please Select ▼

edit

3. Now select [No](#) from the drop-down list, and notice that nothing changes on the form.

☒ Execute Visibility Validations   ☒ Refresh Page On Changes

Cover Letter
Order Questions   Add Question To Section

Include cover letter?

No ▼

edit

- Next, select **Yes** from the drop-down list and look at your form. The additional question is now visible for you to choose from

☒ Execute Visibility Validations   ☒ Refresh Page On Changes

---

Cover Letter
Order Questions   Add Question To Section

Include cover letter? **Yes** edit

☐ Kevin Berardino   ☐ Leslie Hatcher  
☐ Wendy Cheng-Wong   ☐ John Laurino  
☐ Cameron Fenley   ☐ Helen Torbe

Select cover letter: edit

- To test all features you have included in your form, follow the instructions in the User Manual under Completing a Sales Form.

## Advanced Options

CLOSE X

General Information
Options
Advanced Options

Delete Question

USE CAUTION! DELETE QUESTION

(this will remove the column and answers as well)

To delete a question in your SalesDoc:


- Click on the **Advanced Options** tab.
- Click **Delete Question**. This action will remove the question as well as all associated answers.

## Delete SalesDocs

To delete a SalesDoc form:

- Click on the **SalesDoc** icon from the Navigation bar at the top of the screen.

The screenshot shows the PMAPS WebPro interface. At the top, there's a navigation bar with 'Sales Docs' highlighted. Below it, a search bar is visible. The main content area shows a table of forms. The table has columns for 'Form Name', 'Display', 'Copy', and 'Delete'. A row is visible with 'Sample SD' in the 'Form Name' column. The 'Delete' button in this row is highlighted with a red 'X' icon.

- Choose the **SalesDoc** to delete by clicking on it.
- Click the **Delete**  icon.

4. Select the [Cover Page Break Option](#). There are three options:

- Continuous Section Break
- New Page Section Break
- No Break

## ASSEMBLY AND PROJECT MANAGEMENT CENTER MODULE

### Overview

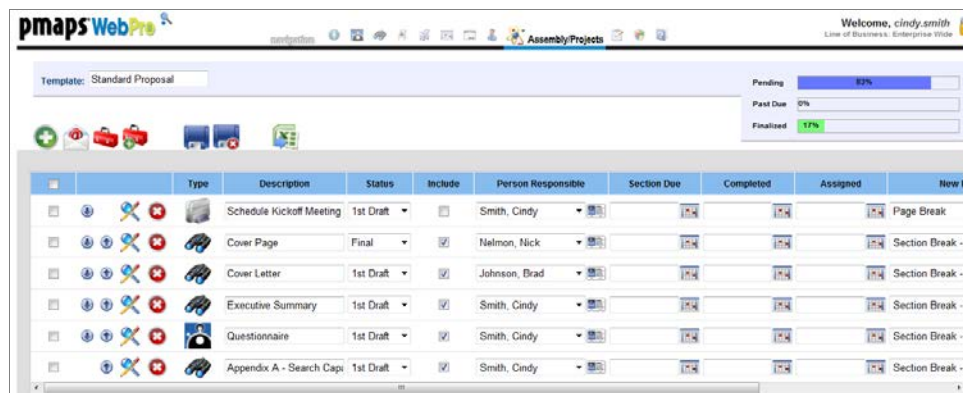
The Assembly and Project Management Center is a project management tool, built right into PMAPS that can provide vast control over each aspect of the proposal process.

This module can be used to create template questionnaires with standard attachments ready for printing or to create a template form document such as biographical groupings.

This feature acts as a file manager, tracking each section of the proposal. Administrators have the ability to create template sections that can be automatically linked to a new proposal. Sections can be added or deleted depending on the details of each specific proposal's requirements.

This section covers the creation of the templates. Please see the Assembly/Project Management Center Wizard in the User Manual for instructions on assembling a template.

Following is an example of a template.



### Building a Template

1. Click the [Assembly/Projects](#) icon on the icon bar to the top of the screen.





The Assembly and Project Management Center screen is displayed, showing existing templates. Click [Create a new Template](#) above the existing template results grid.

Select a template to edit. \*To edit a Proposal's assembly, select one from the [Dashboard](#)

Search:

Create a new Template [+](#)

Name	Created	Last Edited	
*Global Small Cap Biographies	10/11/2011	5/30/2012	
*RFP Standard Template	3/1/2010	5/9/2012	
*Small Cap Equity Executive Summary	3/12/2010	10/5/2011	
Assemble Sections	1/5/2012	1/5/2012	

2. The new template opens to enable you to build it.

pmaps WebPro Assembly Projects

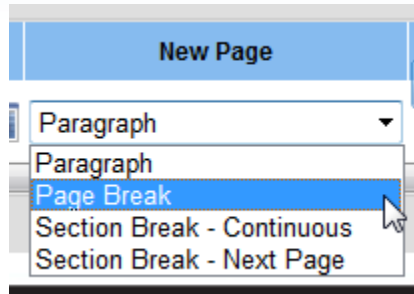
Welcome, cindy.smith  
Line of Business, Enterprise Wide


Template: Standard Proposal

Pending: 100%  
Past Due: 0%  
Finalized: 0%

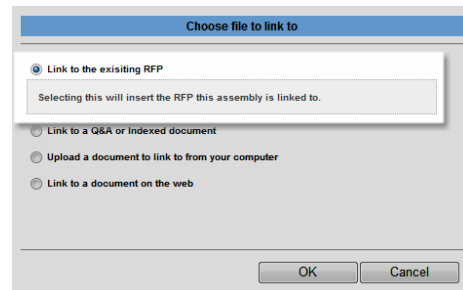
Type	Description	Status	Include	Person Responsible	Section Due	Completed	Assigned	New Page
		Open	<input checked="" type="checkbox"/>	[empty]				Paragraph

3. The new template displays one available row to fill in. Fill this row in first:
  - a. Enter the [Description](#) e.g. Cover Page
  - b. Select a [Status](#).
  - c. Check [Include](#) if you want the current item included in the assembly. This option allows you to add items to the project that you don't want or need assembled.
  - d. Under [Person Responsible](#), choose the person you want this section assigned to if it is the same person every time you use this template. If the responsibility changes according to the proposal, skip over this step in the template creation stage and it may be selected during the Assembly/Project Management stage.
  - e. Leave [Section Due](#), field blank. The date field is entered during the Assembly/Project Management process, specific to the due date of the proposal chosen to apply the template to.
  - f. Leave the [Completed](#) date blank. The Completed date is entered during the Assembly/Project Management process.
  - g. Leave the [Assigned](#) date blank. The Assigned date is entered during the Assembly/Project Management process.
  - h. Under [New Page](#), click arrow to view the drop down menu of choices:

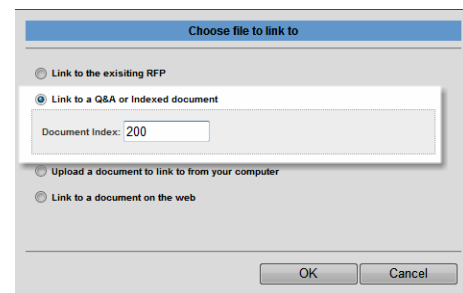


- i. Check the [Merge](#) box if you want documents merged together. For example, if you split up the questionnaire and assign different sections to different members of the proposal team, this feature will join the document back together during assembly.
- j. The [Notes](#) field allows you to enter notes pertaining to the section. If you email the section out for completion, the Notes are included in the email.
- k. Link the document to be used for the assembly. Click the  icon under the Type column to link the file for Assembly. You will now choose one of four options:

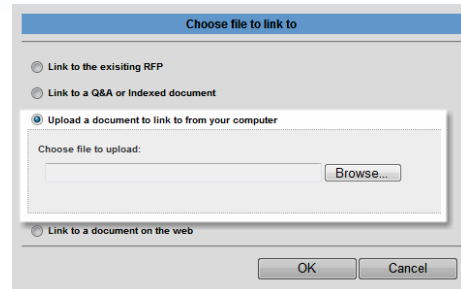
- Link to the existing RFP. Selecting this option will link the Dashboard document to the Assembly.



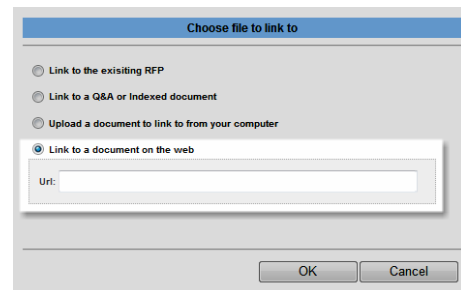
- Link to a Q&A or Indexed document (in PMAPS) by entering the PMAPS Document ID number in the space provided. Once linked, the SearchID number is shown next to the Document Index link so users know which Q&A is being used.




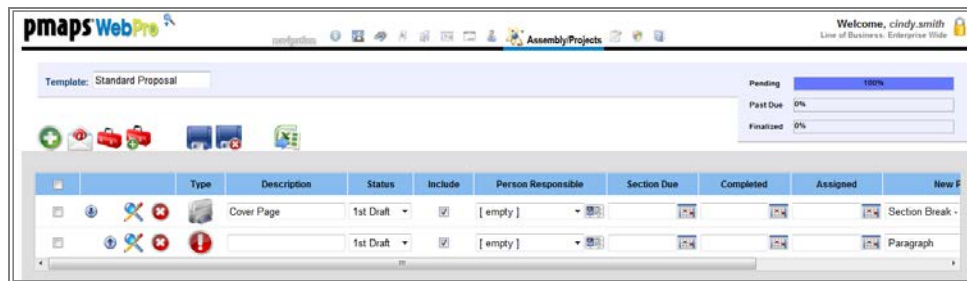
- Upload a document to link to from your computer. Click browse and your Windows Explorer when open, allowing you to navigate to documents on your computer or network. You can upload Word, Excel, PPT and PDF files in Assembly Center. Once a document is uploaded, the file name is displayed, so users know from where the original file was uploaded.




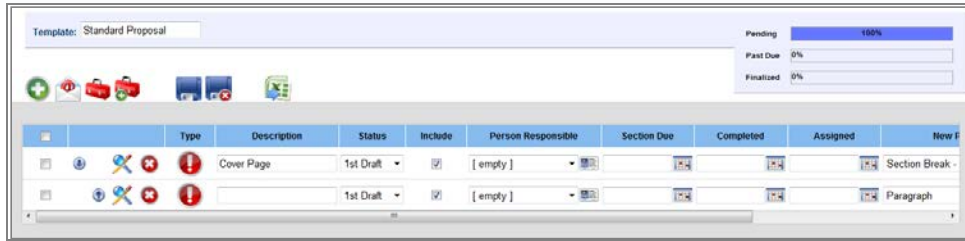
- Link to an .htm or .html document on the web. Type or paste the URL into the space provided.



1. Click **OK**. Now that you have linked a document, the  icon will change based on the type of link you have created. In the screen shot below, the user chose the option to link to a file on their computer, so a file icon is shown.



4. Add a new Line to the template by clicking the **Add Line**  icon. A line is added to the bottom of the template.



5. Repeat Step 3 a-k until you have added all the lines and information you need for your template. Click [Save Assembly](#) to save all changes

## Icons for Creating Templates and Running the Assembly Wizard



[Add Line](#) to template.



[Load Template](#) is used in the Assembly Wizard to choose a template to associate with a proposal and load it.



Allows you to open an existing template, add additional lines, and save it as a new template.



Once you have loaded a template and customized it, you need to save it so it keeps your changes.



Allows you to revert back to the last time you saved your assembly using the Save Assembly icon.



Allows you to reorder the lines on your template.



Allows you to email the document linked to this line to the [Person Responsible](#)



Allows you to view and edit the document linked to this line.



Allows you to delete the current line.



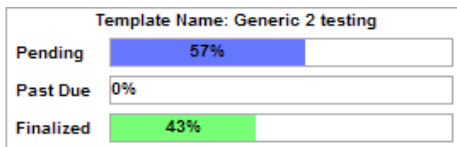
Document type icon: [Document from your computer or network](#).



Document type icon: [PMAPS record](#).



Document type icon: [PMAPS Proposal](#) uploaded to the “cloud.”



Completion status of template.


## DATA BRIDGE MODULE

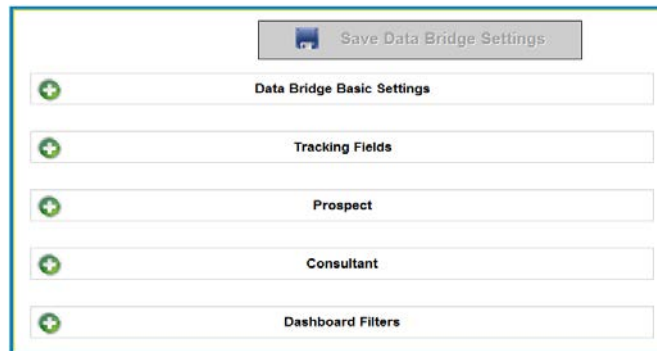
### Overview

The Data Bridge is a separate module that should be installed directly on the Administrator’s workstation.

The Data Bridge module is the vehicle for importing and exporting data between external applications and the WebPro Dashboard. This module is a separate installation and should be installed on a PMAPS Administrator’s PC. For details on the Data Bridge installation click the following link: [PMAPS WebPro Data Bridge Installation Guide](#).

### Configuring the Data Bridge in WebPro


1. Click on the Administration icon  **Administration** to open the panel.
2. Locate and click on the Data Bridge tab.
3. The following screen is displayed:




On this screen you may add your settings and customize the importing and exporting of data. There are five sections available for customization:

- Data Bridge Basic Settings
- Tracking Fields
- Prospect

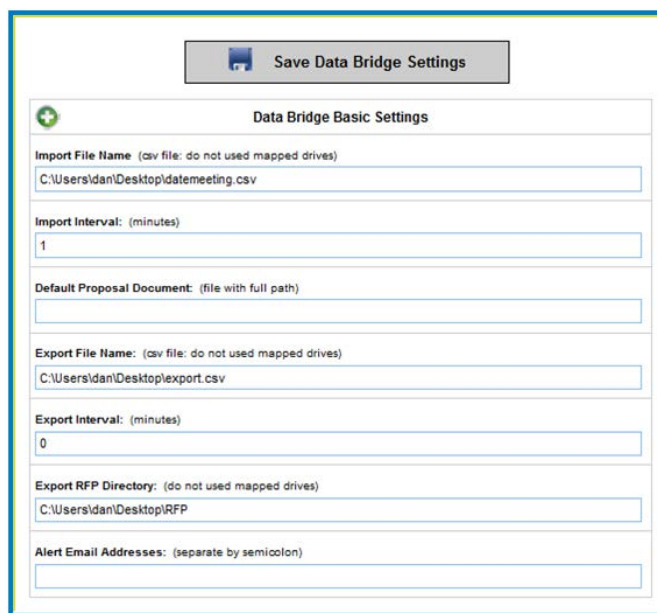
- Consultant
- Dashboard Filters

This icon  allows you display/hide the customization options for each section. Click to display the options for a particular section. When you are finished, click the Save Data Bridge Settings icon to save your changes.

Click the  icon again to hide the customization options for that section.

## Data Bridge Basic Settings

This section contains all the details on files that are imported or exported as well as how often they are exported and who receives notifications.



The screenshot shows a web form titled "Data Bridge Basic Settings" with a "Save Data Bridge Settings" button at the top. The form contains the following fields:

- Import File Name:** (csv file: do not used mapped drives) - C:\Users\dan\Desktop\datameeting.csv
- Import Interval:** (minutes) - 1
- Default Proposal Document:** (file with full path) - [empty]
- Export File Name:** (csv file: do not used mapped drives) - C:\Users\dan\Desktop\lexport.csv
- Export Interval:** (minutes) - 0
- Export RFP Directory:** (do not used mapped drives) - C:\Users\dan\Desktop\RFP
- Alert Email Addresses:** (separate by semicolon) - [empty]

- **Import File Name:** tells the indexer which CSV file you want to import in to WebPro. It can be a local drive, such as C:\ or a UNC path, including the file name. It may not be a mapped drive. This path must point to a CSV file. If you enter just a location you will receive an error.
- **Import Interval:** tells the Indexer, in minutes, when to scan the import CSV file. In the preceding screenshot example, the Import Interval is set to 1. Therefore, the Indexer would scan the import CSV every minute for any changes or additions and add them appropriately.
- **Default Proposal Document:** adds a blank or pre-made proposal if there is not one listed in the CSV file. Adding this prevents errors when you attempt to open a proposal that does not have a file associated with it during importing.

- **Export File Name:** tells the indexer which CSV file you want to export WebPro data to. It can be a local drive, such as C:\ or a UNC path, including the file name. It may not be a mapped drive. This path must point to a CSV file. If you enter just a location you will receive an error.
- **Export Interval:** tells the Indexer, in minutes, when to scan the import CSV file. In the preceding screenshot example, the Export Interval is set to 0. So, nothing is being exported. If there were a 1 in this field, the Indexer would scan the export CSV every minute for any changes or additions and add them appropriately.
- **Export RFP Directory:** is used to keep all of the exported RFP's in one location.
- **Alert Email Addresses:** tells the indexer whom to notify when CSV files are imported or exported. You may enter one or more email addresses. Notifications are automatically sent to each email address listed every time files are imported or exported.

## Tracking Fields, Prospect/Client (fields)/Consultant (fields)

After you have set up your basic settings, you will map the fields in your .csv file to the fields in WebPro. These three sections allow you to map the column headings in your CSV files to the WebPro Fields. For each field, you may choose:

- **None** – don't export or import
- **Import** – information is imported from your CSV file to WebPro
- **Export** – information is exported from WebPro to your CSV file.

The choices are radio buttons, which means you may only choose one option for each field. In the Tracking Field screenshot below, the RFP name is selected for import. Once you select either import or export, the field on the right will become visible so you may copy the heading from the CSV file that corresponds to the WebPro field name and paste into the field. This must match EXACTLY so we recommend using copy/paste.


## Tracking Fields section

Tracking Fields				
WebPro Field	None	Export	Import	Export/Import Field Heading
Proposal Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	RFP Name <input type="text"/>
# of T Lines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
# of Users	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Art Work Received	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Attention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Bid Pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Broker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CD and/or Flash Drive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

\*\*The RFP Name selection is mandatory, because it is the unique Identifier used by WebPro.

## Prospect (/Client Name) fields section


Prospect				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
State	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Zip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Symbol	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unique ID	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Web Site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

 Save Data Bridge Settings



## Consultant (Fields) section

Consultant				
WebPro Field	None	Export	Import	Export/Import Field Heading
Name (required for imports)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Phone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Fax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Web Site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Unique ID	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Address 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
City	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
State	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Zip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

 Save Data Bridge Settings

## Creating and Formatting your .csv file for Import/Export

First, you will need to determine the internal workflow to export data from your CRM or other application to the format required for import to PMAPS WebPro via Data Bridge

File formatting:

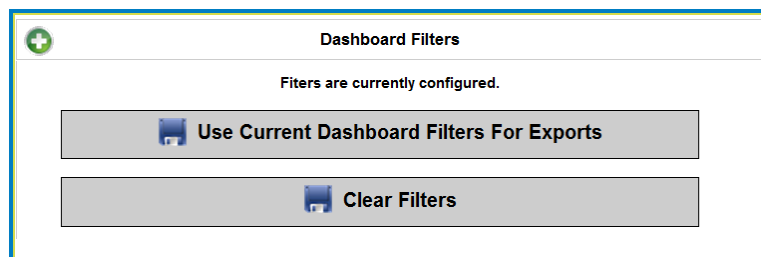
- File to be imported to must be a .csv file
- First column must not have any empty rows (import to WebPro only)
- You must include the Proposal Name field. The Proposal Name is the “unique identifier” for each opportunity
- The first row must contain the column headers. Each header must be copied exactly when mapping the data to the appropriate PMAPS field in the Data Bridge setup.
- Names must be in Last, First format– see additional instructions for a shortcut to formatting names.
- Check formatting on cells to be sure the format matches the data type. For example, dates must be formatted as dates, numeric values are formatted as numbers and so on. dates are dates
- Numeric fields cannot have decimals, negative numbers or currency indicators
- We don't recommend importing open notes fields due to character limits

To change names from First Last format to Last, First format (Joe Smith to Smith, Joe)

- Insert two columns to the right of the names
- Select Data tab, then Text to Columns
- Follow wizard (be sure to select the right formats) and click finish
- Names will be split to two columns - first name in one, last name in two
- In third column, use concatenate formula to create Last, First format:
- =CONCATENATE(B1, ", ", B2)
- Copy and Paste VALUES to the first column

## Dashboard Filters

This section allows you to choose whether to take current dashboard filters into account when exporting, or whether to clear all filters before the export.



## DOCUMENT TEMPLATES

### Microsoft Word Templates

Microsoft Word templates are based on the [Language](#) attribute in the [Search](#) library (internal field name is also [Language](#); position [A3](#)). Note this label may have been customized in your PMAPS application, so you may need to look for the internal field name by clicking the [More Info](#) button.

In order to make a template available, you first must add the appropriate value, e.g., language, to that pick list. Once added to the pick list, you then have the ability to upload the template in the [Administration](#) module, [Other Settings](#), [Document Templates](#). In the instructions below the term “language” is used to describe the process; however, the template types could be based on another criteria, such as “product” or “strategy.”

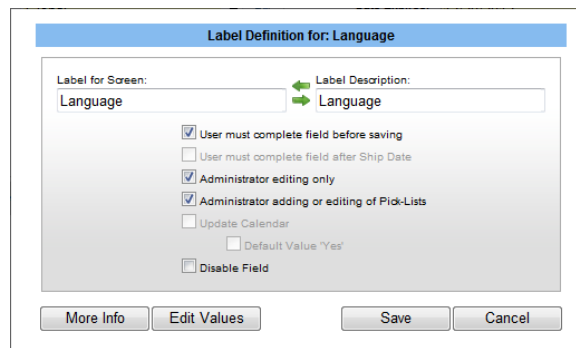
## Create Template Values

1. Determine which languages require a template and add those values to the [Language](#) pick list. This field is located in the [Search](#) module on the [Attributes](#) tab.




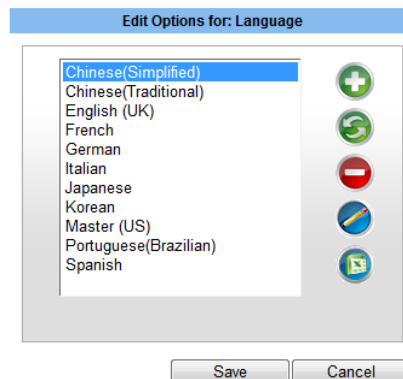
The screenshot shows the 'Structure Details' window with a dropdown menu open for the 'Language' field. The dropdown list contains the following options: \*PRS, Chinese(Simplified), Chinese(Traditional), English (UK), French, German, Italian, Japanese, Korean, Master (US), Portuguese(Brazilian), and Spanish. The 'Spanish' option is currently selected and highlighted in blue.

- a. Click on the [?](#) icon. The following screen is displayed.



The screenshot shows the 'Label Definition for: Language' window. It contains fields for 'Label for Screen:' (Language) and 'Label Description:' (Language). Below these fields are several checkboxes: ☒ User must complete field before saving, ☐ User must complete field after Ship Date, ☒ Administrator editing only, ☒ Administrator adding or editing of Pick-Lists, ☐ Update Calendar, ☐ Default Value 'Yes', and ☐ Disable Field. At the bottom are buttons for 'More Info', 'Edit Values', 'Save', and 'Cancel'.

- b. Click [Edit Values](#) to build the pick list.
- c. Click the  icon to add a new value to the list.

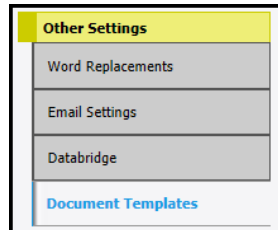


The screenshot shows the 'Edit Options for: Language' window. It features a list box containing the following language options: Chinese(Simplified), Chinese(Traditional), English (UK), French, German, Italian, Japanese, Korean, Master (US), Portuguese(Brazilian), and Spanish. To the right of the list box are five icons: a green plus sign (Add), a green circular arrow (Refresh), a red minus sign (Remove), a blue pencil (Edit), and a blue document with a plus sign (New). At the bottom are 'Save' and 'Cancel' buttons.






- d. [Save](#).
- e. Repeat [a-d](#) to add the remaining values to the list.

## Add New Template

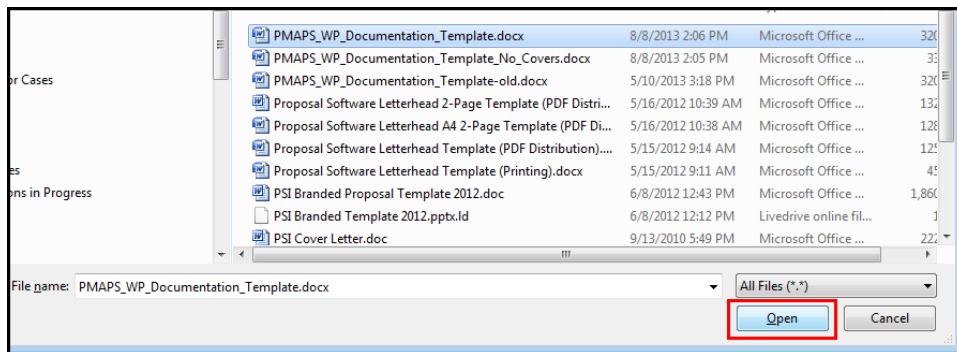
1. To add templates, go to the [Administration](#) module and select [Document Templates](#).



2. Select the option for which you would like to upload a template.
3. Click the [Upload...](#) button next to the value for which you wish to load a template.

Microsoft Word Templates			
Language	Preview	Description	Upload
Arabic		Default Template - Arabic[1].doc	<a href="#">Upload...</a>
English (UK)		UK.doc	<a href="#">Upload...</a>
English (US)		Default Template - English[1].doc	<a href="#">Upload...</a>
French		Default Template - French[1].doc	<a href="#">Upload...</a>
German		Default Template - German[1].doc	<a href="#">Upload...</a>







4. Using Windows Explorer, browse to the template you would like to use when this value is selected for adding new records. This document must end in .doc or .docx only. Select the document and click the [Open](#) button.



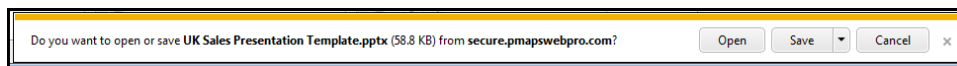
5. The new file will be added to an available template.

## Edit Template







1. Under [Microsoft Word Templates](#), click the [Preview](#) icon for the template you wish to edit.

Microsoft Word Templates			
Language	Preview	Description	Upload
Arabic		Default Template - Arabic[1].doc	<a href="#">Upload...</a>
English (UK)		UK.doc	<a href="#">Upload...</a>
English (US)		Default Template - English[1].doc	<a href="#">Upload...</a>
French		Default Template - French[1].doc	<a href="#">Upload...</a>
German		Default Template - German[1].doc	<a href="#">Upload...</a>
Russian		Strategy for Product X.docx	<a href="#">Upload...</a>







2. Locate the Internet Explorer prompt and choose to [Open](#) or [Save](#) the file.



3. Edit the file as appropriate then save and close the file.
4. Click the [Upload...](#) button next to the template being replaced.

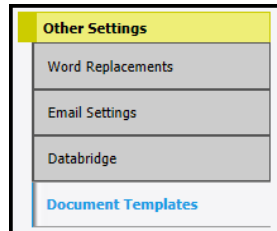
Microsoft Word Templates			
Language	Preview	Description	Upload
Arabic		Default Template - Arabic[1].doc	<a href="#">Upload...</a>
English (UK)		UK.doc	<a href="#">Upload...</a>
English (US)		Default Template - English[1].doc	<a href="#">Upload...</a>
French		Default Template - French[1].doc	<a href="#">Upload...</a>
German		Default Template - German[1].doc	<a href="#">Upload...</a>
Russian		Strategy for Product X.docx	<a href="#">Upload...</a>

5. Using Windows Explorer, browse to the revised template you would like to upload. This document must end in .doc or .docx only. Select the file and click the [Open](#) button.
6. The new file will be added to an available template.

Microsoft Word Templates			
Language	Preview	Description	Upload
Arabic		Default Template - Arabic[1].doc	<a href="#">Upload...</a>
English (UK)		UK.doc	<a href="#">Upload...</a>
English (US)		Default Template - English[1].doc	<a href="#">Upload...</a>
French		Default Template - French[1].doc	<a href="#">Upload...</a>
German		Default Template - German[1].doc	<a href="#">Upload...</a>
Russian		PMAPS_WP_Sample_Questionnaire.doc	<a href="#">Upload...</a>

## Microsoft PowerPoint Templates

To add, edit and remove templates, go to the Administration module and select Document Templates.

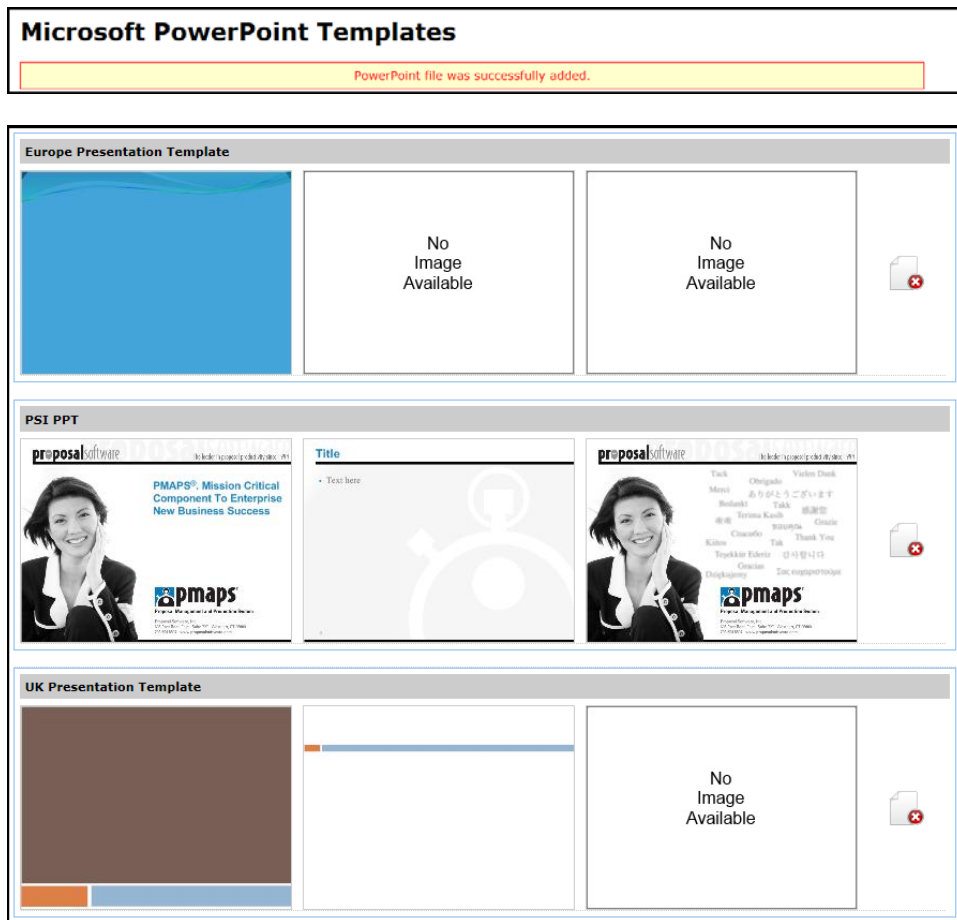


### Add New Template

1. Under [Microsoft PowerPoint Templates](#), click the [Browse...](#) icon.

2. Using Windows Explorer, browse to the template you would like to upload. This document must end in .ppt or .pptx only. Select the file and click the [Open](#) button.
3. Enter a description for the template. This will display as a selection option when adding new PowerPoint files under [Search](#) and as the template title in [Document Templates](#).

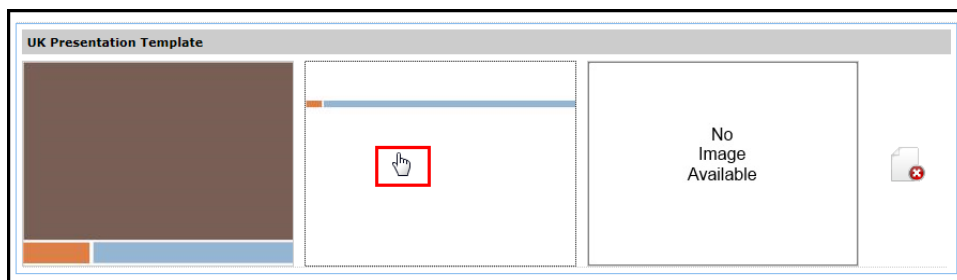
4. A confirmation message displays indicating the PowerPoint file was successfully added. Templates are listed in alphabetical order based on the description added.



## Edit/Remove Template

To edit an existing template, there are two options:

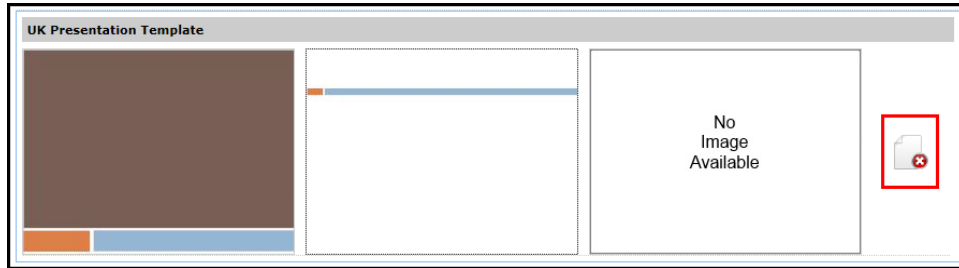
1. Download the template, make edits and replace the template.
  - a. To download a template, hover the mouse anywhere over the template area, except for the delete icon and single click the mouse. When the mouse is in the correct location the hand cursor displays.



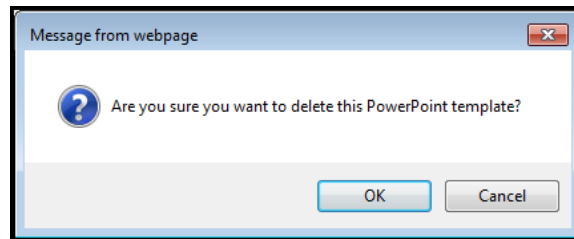
- b. Locate the Internet Explorer prompt and choose to [Open](#) or [Save](#) the file.



- c. Edit the file as appropriate then save and close the file.
- d. Remove the old template by clicking on the delete icon next to the template. It may be helpful to make a note of the description (title) of the template before removing.



- e. At the delete confirmation prompt, click [OK](#) to remove the template or [Cancel](#).



- f. Upload the revised template by clicking the [Browse...](#) icon.

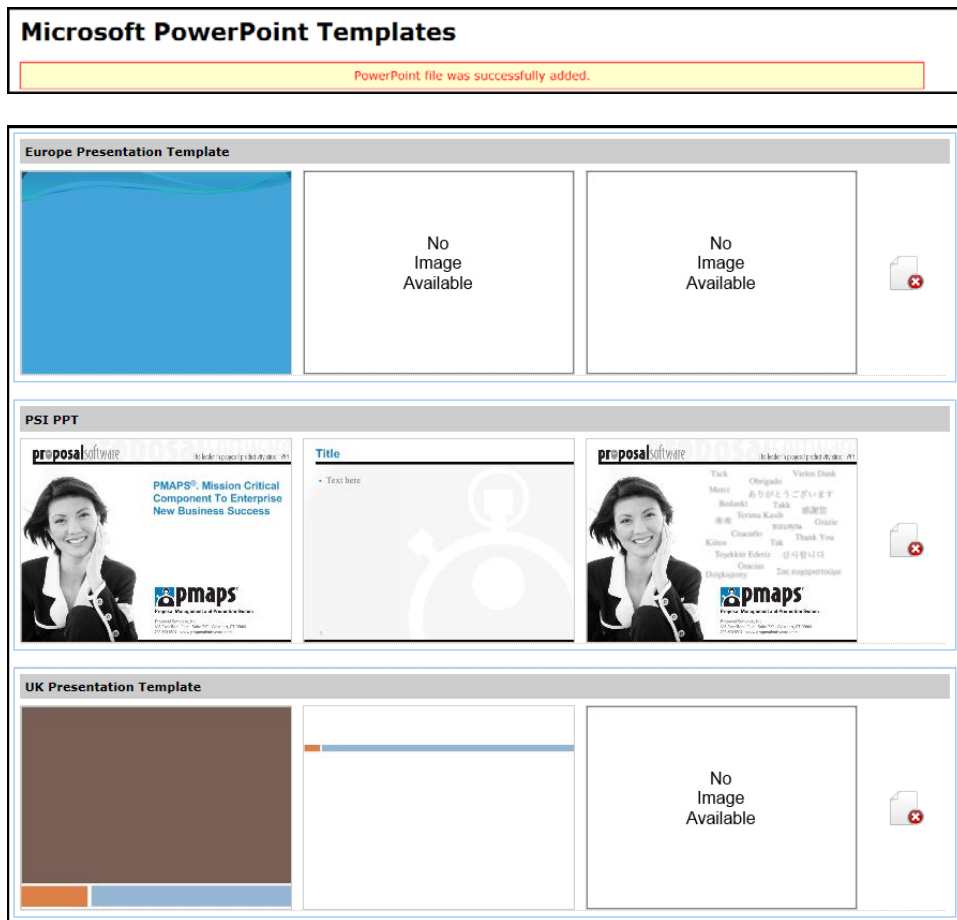
A web form titled "Microsoft PowerPoint Templates". Below the title is a blue bar with the text: "To add a new PowerPoint, fill out the information below:". The form contains a "File:" label followed by a text input field and a "Browse..." button. Below this is a "Description:" label followed by a text input field. At the bottom left is an "Upload PowerPoint..." button.

- g. Using Windows Explorer, browse to the template you would like to upload. This document must end in .ppt or .pptx only. Select the file and click the [Open](#) button.
- h. Enter a description for the template. This will display as a selection option when adding new PowerPoint files under [Search](#) and as the template title in [Document Templates](#).

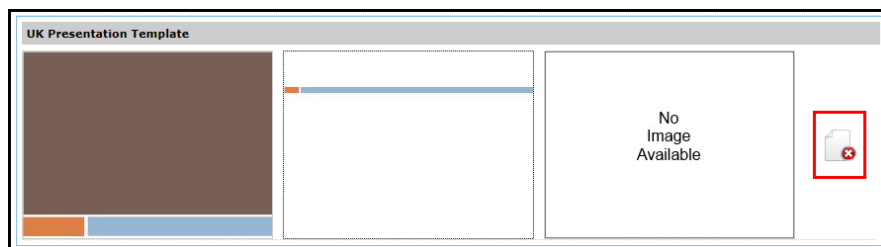
The same "Microsoft PowerPoint Templates" form as in the previous image, but now filled out. The "File:" field contains the path "C:\Users\Colleen\Desktop\PSI PPT template.pptx" and the "Browse..." button is disabled. The "Description:" field contains the text "US Sales Presentation Template". The "Upload PowerPoint..." button remains at the bottom left.



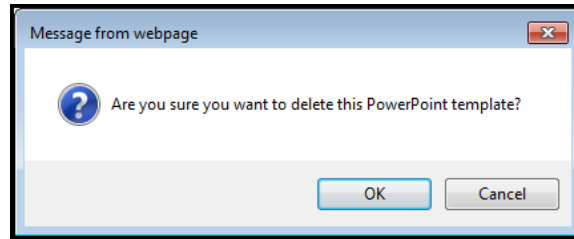
- i. A confirmation message displays indicating the PowerPoint file was successfully added. Templates are listed in alphabetical order based on the description added.



2. Delete the existing template and upload a new one in its place.
  - a. Remove the old template by clicking on the delete icon next to the template.



- b. At the delete confirmation prompt, click [OK](#) to remove the template or [Cancel](#).



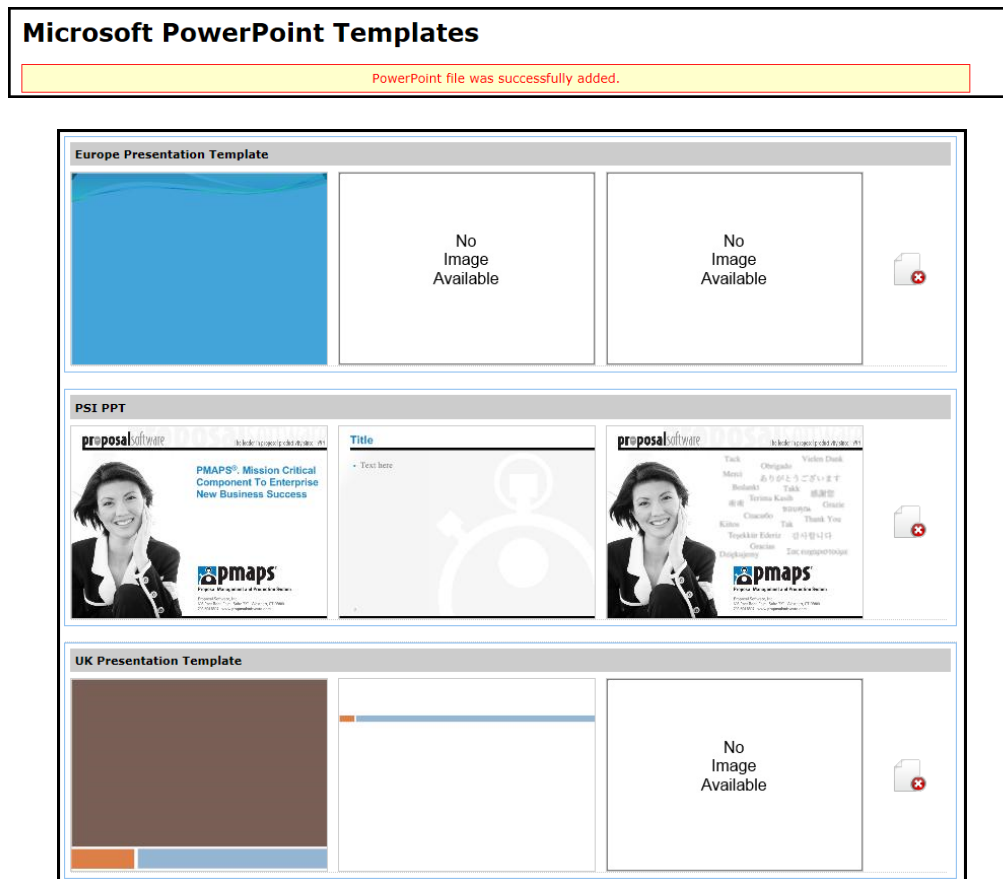
- c. Upload the new template by clicking the [Browse...](#) icon.

A screenshot of the 'Microsoft PowerPoint Templates' form. It has a blue header with the title. Below is a light blue bar with the text 'To add a new PowerPoint, fill out the information below:'. The form contains a 'File:' text box with a 'Browse...' button to its right, a 'Description:' text box, and an 'Upload PowerPoint...' button at the bottom. The 'Browse...' button is highlighted with a red rectangle.

- d. Using Windows Explorer, browse to the template you would like to upload. This document must end in .ppt or .pptx only. Select the file and click the [Open](#) button.
- e. Enter a description for the template. This will display as a selection option when adding new PowerPoint files under [Search](#) and as the template title in [Document Templates](#).

A screenshot of the 'Microsoft PowerPoint Templates' form, similar to the previous one but with data entered. The 'File:' text box contains the path 'C:\Users\Colleen\Desktop\PSI PPT template.pptx' and the 'Description:' text box contains 'US Sales Presentation Template'. The 'Browse...' button is still present to the right of the file path.

- f. A confirmation message displays indicating the PowerPoint file was successfully added. Templates are listed in alphabetical order based on the description added.



## WEBPRO SETTINGS, SECURITY TEST AND TROUBLESHOOTING

Additional features have been added to the Other Settings allowing for faster troubleshooting and resolution of support issues. Generally, Proposal Software staff will be the ones to utilize or direct customer Administrators to these functions.

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